

# SIERRA VISTA

## ECONOMIC OUTLOOK 2010



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Miller  
Peak view

## A review of the national, state, and local economy

### National

From the beginning of the recession in December 2007 through December 2009, the national economy lost 8.4 million jobs, pushing the unemployment rate from 4.9 to 10 percent. The unemployment rate in October 2009 hit its highest level since June 1983.

Gross domestic product (GDP), the broadest measure of economic activity, declined by 0.7 percent (annualized) in the first quarter of 2008. The second quarter saw modest growth of 1.5 percent, attributable to the economic stimulus package that sent tax rebate checks to millions of American households in an effort to boost consumer spending, which accounts for about two-thirds of GDP. GDP fell by 2.7 percent in the third quarter and 5.4 percent in the fourth quarter of 2008. In the first quarter of 2009, GDP fell by 6.4 percent, followed by a 0.7 percent decline in the second quarter. The decline in the first quarter of 2009 was the largest drop in production since the first quarter of 1982. Potentially signaling the end of the recession, GDP grew by 2.2 percent in the third quarter of 2009 and by 5.9 percent in the fourth quarter.

The big question is whether the economic growth seen in the second half of 2009 will be sustainable into 2010, or whether the economy will slip back into recession. Much of the economic growth in the latter half of 2009 was spurred by government stimulus efforts, including 'cash for clunkers,' which provided government subsidies to automobile dealerships toward the trade-in of high-fuel-consumption vehicles; homebuyer tax credits; low interest rates spurred by the government purchase of mortgage-backed securities; and various government spending projects. Since the spending and tax breaks were funded through government borrowing, they are not sustainable indefinitely. The associated budget deficits and debt service obligations have some economists concerned about their impact on future economic growth. For the recovery to be sustainable, it will need to survive the withdrawal of government stimulus efforts likely to begin in 2010.



**Robert Carreira, Ph.D.**  
Director  
Center for Economic  
Research  
Cochise College



## Arizona

At the state level, the budget deficit dominated the legislative agenda in 2008 and 2009, and into 2010. During the boom years, taxes were cut and state government spending increased to unsustainable levels. The housing market decline and reductions in sales and income tax revenue resulted in budget deficits in fiscal years 2009 and 2010. As of the beginning of February 2010, after spending cuts and much borrowing, the deficit for fiscal year 2010, which ends on June 30, remained at \$250 million. Projections of the budget deficit for fiscal year 2011, which begins July 1, 2010, top \$3 billion.

From December 2007 through December 2009, the state economy lost 276,100 jobs and the unemployment rate rose from 4.3 to 9.1 percent, its highest level since August 1983. The most job losses were in construction, which lost 78,200 jobs over the 2-year period, followed by trade, transportation, and utilities, which lost 66,300 jobs, and professional and business services, which lost 59,600 jobs. Three quarters of the jobs lost in the trade, transportation, and utilities industry grouping were in retail trade.

Retail sales countywide declined in 21 of 25 months from November 2007 through November 2009, when compared to the same months the year prior.

Arizona's GDP fell by 0.6 percent in 2008, following slow growth of 1.4 percent the year prior. Arizona's economy was 43rd in the nation in 2008, ranked according to economic growth rates. In 2005 and 2006, Arizona was one of the top 3 fastest growing states. The decline in construction was the major cause of the slowdown, subtracting 0.98 points from the state's GDP in 2008. This was followed by finance and insurance, which subtracted 0.68 points.

## Cochise County

Cochise County's retail market slipped into recession in late 2007 and remained there through 2008 and most of 2009. Retail sales countywide declined in 21 of 25 months from November 2007 through November 2009, when compared to the same months the year prior. For the year, retail sales countywide declined by 6.5 percent in 2008, after adjusting for inflation. In the first 11 months of 2009, sales were down 3 percent compared to the same period of 2008. Despite the overall decline in 2009, sales were up in October and November, the most recent 2 months of data, signaling a potential recovery.

Cochise County's restaurant and bar sales also slipped into recession in late 2007. In 2008, inflation-adjusted sales were up 0.2 percent compared to 2007. Monthly sales, however, were down in 9 months of the year, and were down for 6 consecutive months from June through November. The monthly increase of 2.8 percent in December 2008 pushed sales for the year into positive territory.

### U.S. RECESSIONS SINCE 1945

PEAK	TROUGH	DURATION (MONTHS)
FEBRUARY 1945	OCTOBER 1945	8
NOVEMBER 1948	OCTOBER 1949	11
JULY 1953	MAY 1954	10
AUGUST 1957	APRIL 1958	8
APRIL 1960	FEBRUARY 1961	10
DECEMBER 1969	NOVEMBER 1970	11
NOVEMBER 1973	MARCH 1975	16
JANUARY 1980	JULY 1980	6
JULY 1981	NOVEMBER 1982	16
JULY 1990	MARCH 1991	8
MARCH 2001	NOVEMBER 2001	8
DECEMBER 2007	?	?

Source: National Bureau of Economic Research.

From January through November 2009, sales were up 0.9 percent compared to the same period of 2008. Sales were up in 8 of the 12 months from December 2008 through November 2009, a positive sign that this industry is on the path of recovery.

The county's accommodation sales, which saw extraordinary growth in 2007, slipped into recession in April 2008. Accommodation sales, which include hotel, motel, and other temporary lodging stays of less than 30 days, were up 0.1 percent for the year in 2008, after the inflation adjustment. However, sales were down in 7 of the 8 months from April through November 2008, and, as with restaurant and bar sales, it was strong sales in December that pushed annual figures into positive territory. For the first 11 months of 2009, sales declined 4.7 percent. In a positive sign, sales were up for 3 consecutive months from September through November 2009, potentially signaling a recovery.

From the beginning of the recession in December 2007 through December 2009, Cochise County lost 1,250 jobs and the county's unemployment rate rose from 4.8 to 7.1 percent. Despite the rise in unemployment, Cochise County had the lowest unemployment rate of

Arizona's 15 counties for most of 2009, due in large part to Fort Huachuca, as well as job creation at Aegis Communications in Sierra Vista and the new ACT Call Center in Douglas. The county's private sector lost 1,625 jobs from December 2007 through December 2009, partially offset by a gain of 375 government jobs. Within the government sector, Cochise County saw a gain of 500 federal government jobs, partially offset by the loss of 125 state and local government jobs. In the private sector, the hardest hit industry was financial activities, which lost 41.9 percent of the jobs it had in December 2007, followed by manufacturing and information, each of which lost a third of all jobs, and other services, which lost nearly a quarter of all jobs.

New residential home construction in Cochise County continued to struggle in 2008 and into 2009. There were 296 new home permits issued throughout Cochise County in the first 10 months of 2009, down 17.1 percent from the same period of 2008. This followed annual declines of 18.8, 47.6, and 14.1 percent in 2006, 2007, and 2008, respectively. Despite the overall decline in the first 10 months of 2009, permits in the third quarter were 29.6 percent higher than in the third quarter of 2008. Permits were up in each month of the third quarter and into October signaling the potential start of the recovery phase.

Existing home sales in Cochise County hit the bottom of the market in 2008 and remained there into 2009. Sales of site-built homes, including townhouses and condominiums, fell 20.6, 10.7, and 18.3 percent in 2006, 2007, and 2008, respectively. The decline in 2009 was less than half a percent, representing a continued crawl along the market trough. From 2007 to 2009, the countywide median home price fell by 8.5 percent, after increasing 37.7 percent from 2004 through 2007. While prices have dropped, the declines have been much more moderate than in other areas of the state and nation. According to the ACCRA Cost of living index, housing costs in Cochise County, which include both home prices and rental rates, were 5.4 percent below the national average in 2007, but 3.1 percent above the national average in 2008 and 4.1 percent above in 2009.

## Sierra Vista

In the first 11 months of 2009, retail sales in Sierra Vista were down 1.5 percent in real (inflation-adjusted) terms, compared to the same period of 2008. Although sales were down, the pace of decline slowed in the second half of the year and sales were up in November, when compared to November 2008. Restaurant and bar receipts in the first 11 months of 2009 were up 3.1 percent from the same period of 2008. Accommodation receipts were up 6 percent, with strong performance driven by the recent opening of several new hotels in the city.

Sierra Vista saw a rebound in new residential construction in 2008 with an 11.8 percent increase in new home permits. Although permits were down by 1 percent in 2009, they remained well above the trough hit in 2007. The rebound in 2008 followed three consecutive years of steep declines. New home permits fell by 16.3, 26.0, and 58.3 percent, respectively, in 2005, 2006, and 2007. At the bottom of the market in 2007, permits were at their lowest level since 1995 and reflected a decline of 74.2 percent from the peak in 2004. Indications are that the new residential construction market in Sierra Vista has returned to a path of normal growth, notwithstanding the slight decline in 2009. On the existing home side, the market in the Sierra Vista area hit bottom in 2008 and saw modest growth of 2.4 percent in 2009.

Sierra Vista has seen extraordinary growth in commercial construction in recent years. From 2005 through 2009, 105 permits were issued for new construction projects totaling more than \$188 million. Although new commercial construction in Sierra Vista was down by nearly 30 percent in 2007 and was down by more than half in 2008, both years were well above historic trend levels. The year 2009 saw a strong surge, with new commercial real estate investment surpassing 2007 levels in dollar value. With large projects including a new Wal-Mart Supercenter and Sam's Club, although the latter has been delayed, and interest expressed by Olive Garden and International House of Pancakes, the commercial construction boom is likely to continue well into the national economic recovery.



Dawn to Dust mountain biking  
Photo: Ty Holland

Vista Transit  
Center in  
Sierra Vista



## Let's talk progress



**Chuck Potucek**  
City Manager  
City of Sierra Vista

Sierra Vista is moving forward on many fronts, and it's time to talk about the progress being made to reach the mayor and council's goals and objectives. The council's strategic plan—"Our Future Vistas"—is a long-range plan with 2-year objectives, most recently updated in 2009.

There are some impressive accomplishments to report even though we aren't quite a year into this iteration of the strategic plan. For starters, the city's new bandshell, Centennial Pavilion, is currently under construction in Veterans' Memorial Park. The new pavilion will be just over 4,000 square feet with 1,700 square feet of stage area. There'll be abundant room for storage, restrooms, dressing rooms, and other amenities to support high-quality community events and cultural performances. The Centennial Pavilion will be complete in the summer of 2010 and is sure to be a venue for many memorable events in coming years.

The expansion of the city's police station is nearing completion and will include expanded evidence storage, administrative and work areas, a vehicle inspection bay, and, most importantly, the city's first formal Emergency Operations Center. When this project is complete later in 2010, the city's police station will encompass a total of more than 40,500 square feet.

Other infrastructure improvements are either complete or ready to get underway. The largest project on the horizon is the completion of the widening of Charleston Road from Colombo Avenue to Fighting Colt Drive. This project will take approximately 8 to 12 months to complete and construction costs are fully grant funded. On a smaller scale, in 2009 the city was able to use surplus grant funding from another project to construct or improve over 120 ADA ramps throughout the community. The priority order for these improvements was determined by the city's Commission on Disability Issues.

Other initiatives we are pursuing fall under the goal of environmental sustainability. We have

received grant funding to install solar panels at Fire Stations #1 and #2 and at the Nancy J. Brua Animal Care Center. We have also received grant funding to install an energy efficient heating and cooling system at the Oscar Yrun Community Center and to install solar-powered streetlights in several locations in the city. Grant funds will also pay for the installation of a biodiesel fueling station at the city's fuel facility and for the purchase of three new 27-passenger Vista Transit buses that will run on biodiesel fuel.

The city is proceeding with acquiring land to expand the existing Domingo Paiz sports complex both north and south of the existing ball fields, and will eventually be able to add three softball fields, restrooms, and a snack bar to that area. This project is still very much in the planning phase and will depend on the availability of future funding, but the mayor and council are well aware of the community's need for additional recreational facilities.

The council also set a 2-year objective to increase the city's general fund reserves by at least 10 percent by 2011. I was somewhat concerned this would be one objective we might have trouble achieving. However, in spite of an economy that continues to struggle, we are on track to increase reserves by 8 percent this year, putting us in a good position to meet the 10 percent goal by 2011.

Of course, not unlike all other communities in Arizona, we are now beginning to plan for the reduction in state-shared revenues, which will inevitably hit us in the next fiscal year. For Sierra Vista the reduction will be somewhere between \$1.4 and \$1.7 million. That's a significant loss of general fund revenue, especially in a time when our budgets are already tight.

To meet the challenge of funding cuts, we continue to reduce staffing levels through attrition and to shift workloads as necessary to maintain the service levels our residents have come to expect. Whether we will be able to continue to operate without some reduction in services remains to be seen, but the next couple of years will clearly be a challenge financially for all Arizona cities and towns.

As city manager of Sierra Vista, I feel fortunate that our community continues to thrive, even in these difficult times. The presence of Fort Huachuca is a great economic and cultural asset for Sierra Vista and, as always, its presence gives Sierra Vista an advantage in weathering a difficult economy. In addition, we haven't seen the foreclosures or commercial failures that have plagued some Arizona communities and, in fact, Sierra Vista saw an increase in commercial development in 2009. Another good sign of our economic stability is that our residential development held steady for the second consecutive year.

We know times are difficult and we know we'll need to stretch our budgets even further to get through the next few years of declining state-shared revenues. Although there are fewer employees providing city services, they continue to do a great job and to step up to increased workloads and responsibilities. Together, we will make sure Sierra Vista remains a great place to live and do business, and we know we'll see brighter economic times ahead. In the meantime, we'll continue to follow the strategic roadmap set before us by our elected officials, and to take pride in our accomplishments as a community.



Sierra Vista Aquatic Center

Carr Canyon  
Peak  
Photo: courtesy of  
City of Sierra  
Vista



## The City of Sierra Vista

Sierra Vista, founded in 1927 and incorporated in 1956, is the largest of seven incorporated areas in Cochise County. With a population of 46,597 as of mid-2009, Sierra Vista accounts for nearly one-third of the county's population. The city is located 70 miles southeast of Tucson and 189 miles southeast of Phoenix.

Sierra Vista is the retail hub of Cochise County. Although the population of the city limits is 46,597, the city serves a commercial market of more than 110,000 people. Large retail chains including Target, Wal-Mart, Kmart, Dillard's, Sears, Home Depot, Lowe's, and Best Buy are located in the city and serve customers from across Cochise County, neighboring Santa Cruz County, and across the U.S. border with Mexico (for more on Sierra Vista's commercial market, see the Retail Trade and Commerce section of this publication).

In 1999, the city saw the opening of The Mall at Sierra Vista, a one-story enclosed regional shopping mall with 50 stores, a food court, and a 10-screen movie theater. Since then, the city's restaurant industry has expanded considerably and now includes such large chain restaurants as Chili's, Outback Steakhouse, Applebee's, Buffalo Wild Wings, and Texas Roadhouse. A boom in commercial construction from 2005 through 2009 added several new hotels, restaurants, large retailers, office complexes, and other businesses throughout the city. From 2005 through 2009, 105 permits were issued for new construction projects totaling more than \$188 million. For more on this, see the Housing, Real Estate, and Commercial Construction section of this publication.

Fort Huachuca, located in Sierra Vista, is home to the U.S. Army Intelligence Center of Excellence and the U.S. Army Network Enterprise Technology Command and is an integral part of the Sierra Vista economy and community. Fort Huachuca was annexed by Sierra Vista in 1971, thus population figures for Sierra Vista include the population living on the fort. As of September 30,



2009, the resident population of Fort Huachuca was approximately 6,791, which included 1,045 military personnel and 2,805 military family members residing in on-post housing, along with 2,941 unmarried or unaccompanied military personnel residing in troop billets, including students assigned temporarily to the fort for training. Many military personnel and their families also reside in Sierra Vista and surrounding communities.

Sierra Vista hosts a variety of cultural and family-oriented activities and events throughout the year. The Henry Hauser Museum, Sierra Vista Public Library, and Amazing Arizona Series present a continuing program of plays, concerts, musicals, dances, recitals, and readings. Other major events include the Cochise Cowboy Poetry & Music Gathering, Art in the Park, Cars in the Park, Festival of Color Hot Air Balloon Rally, Oktoberfest, Frontier Days, and several parades including a nighttime holiday parade in December. For more information on local events, see the Tourism section of this publication.

Nearby Ramsey Canyon is a popular spot for observing and photographing 14 species of hummingbirds and hundreds of other birds, mammals, reptiles, and plants. Due to the numerous species of hummingbirds, Sierra Vista has been referred to as the Hummingbird Capital of the United States and is typically included on international birding maps.

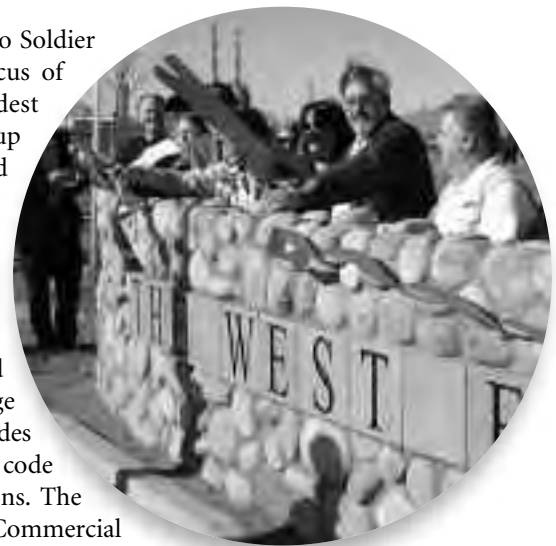
Nearby locations of interest include Kartchner Caverns State Park, the cities of Tombstone and Bisbee, the San Pedro Riparian National Conservation Area, the National Historic Landmark District of Fort Huachuca, Coronado National Memorial, and the Coronado National Forest. Within driving distance are many other attractions including Arizona's Wine Country, Cochise Stronghold, the Amerind Foundation and Museum, Texas Canyon, San Bernardino Wildlife Refuge, and the Chiricahua National Monument. To learn more about Sierra Vista, visit the city's website at [www.SierraVistaAZ.gov](http://www.SierraVistaAZ.gov). For more information on attractions or events in the city, go to the Sierra Vista Visitor Center website at [www.VisitSierraVista.com](http://www.VisitSierraVista.com) or phone (800) 288-3861. For information on attractions and events throughout Cochise County, visit the Cochise County Tourism Council's website at [www.ExploreCochise.com](http://www.ExploreCochise.com).

## West End Development

Sierra Vista's West End, which is the area west of Seventh Street to Buffalo Soldier Trail and north of Golf Links Road to State Highway 90, has been the focus of redevelopment efforts by the city in recent years. The area is the oldest neighborhood within the city and includes most of the original area that made up Sierra Vista when it was first incorporated in 1956. The city staff has worked with residents, business owners, Fort Huachuca officials, Downtown Neighborhood Commissioners, and other community leaders to develop strategies to revitalize the area and promote private investment and redevelopment.

The West End has been viewed as an important component of the city's economy due to its potential to advance small business ownership and entrepreneurship. The city has in place several incentives to encourage redevelopment in the West End. The city's Infill Incentive District Policy provides an expedited review process and offers some flexibility in the city's development code regarding such issues as parking requirements, setbacks, and height limitations. The city also gives consideration to fee waivers for development in the West End. Commercial projects that replace existing structures automatically qualify for a development fee waiver.

Recent and ongoing redevelopment projects in the West End include the Garden Place Suites Hotel, the Piazza San Lorenzo office buildings, Santa Fe Springs Apartments, and Crossing Point Villas, an 80-unit single family detached residential project exclusively for first time homebuyers (Sierra Housing Resource Partners received nearly \$2 million in grants from the Federal Home Loan Bank Board to complete the project). In 2008, Sierra Vista completed construction of the West End Entryway Monument Walls and Signage, funded by a Rural Tourism Development Grant from the Arizona Office of Tourism.





## Sierra Vista Municipal Airport



Photo: Ed Honda

The Sierra Vista Municipal Airport serves southeastern Arizona and northern Mexico, sharing runways with Fort Huachuca's Libby Army Airfield. The airport is one of only 23 civilian/military joint-use airports in the United States, and 1 of only 2 in Arizona. The military owns the land and operates the facilities on the south side of the airport including the control tower, while the city owns 75 acres on the north side including 62 hangars and 35 tie-down sites available for lease to aviators. Hangars include lighting, electrical outlets, skylights, and roof turbine vents, and most have electrically operated doors. Hangar access is available 24-hours a day, seven days a week, through electrically operated security gates. An aircraft wash rack is located on site and fueling services are provided by the city to general aviation and corporate jet customers and corporate jet customers, as well as some military customers and the U.S. Forest Service in support of their annual firefighting activities. Self-fueling facilities will be available by July 2010. For information on hangar or tie-down leasing, phone (520) 458-5775.

The airport has three runways: Runway 08-26 is 12,000 feet long by 150 feet wide and is constructed of reinforced concrete. Runway 12-30 is 5,365 feet long by 100 feet wide, constructed of asphaltic concrete. Runway 03-21 is 4,300 feet long by 75 feet wide, also constructed of asphaltic concrete. Over the past several years, general aviation activity has averaged about 25,000 operations per year, of which approximately 30 percent were itinerant aircraft. During the same period, military use averaged approximately 100,000 operations per year.

A 7,000 square-foot commercial terminal configured for Transportation Security Administration screening, along with a 200-space automobile parking lot, is located at the airport. Currently, there is no commercial air service to the Sierra Vista Municipal Airport.

The Sierra Vista Municipal Airport Master Plan was recently updated and the city recently contracted with Z & H Engineering for a \$4 million rehabilitation project for Runway 12-30. The project was funded by the Federal Aviation Administration and the Arizona Department of Transportation.

In 2009, the City of Sierra Vista received more than \$6 million in funding through the America Recovery and Reinvestment Act (ARRA) for two projects at the Sierra Vista Municipal Airport. The funding is being used to reconstruct a runway on Libby Army Airfield and to realign and reconstruct a taxiway between that runway and the airport terminal ramp. The projects have been part of the city's Airport Capital Improvement Program since 1995 and had been fully designed and ready to bid for nearly 2 years. The projects were programmed to receive funding from the Federal Aviation Administration (FAA) in fiscal years 2011 and 2012. The ARRA funding allows the city to complete the projects more quickly and does not require a local financial match, saving the city approximately \$200,000. It is anticipated that the project will be completed in 2010. For more information on the Sierra Vista Municipal Airport, visit [www.SierraVistaAZ.gov](http://www.SierraVistaAZ.gov).

## Sierra Vista Industrial Development Authority

The Sierra Vista Industrial Development Authority (IDA) was established in 1981 to promote industry and develop trade by inducing manufacturing, industrial, and commercial enterprises to locate to the city. In 1985, the IDA formed the Sierra Vista Economic Development Foundation (SVEDF) to promote industrial and commercial growth and the IDA became the principal not-for-profit organization that provides financial assistance and leadership to stimulate the development of qualified projects with an emphasis on affordable housing. In 2004, the IDA established Sierra Housing Resource Partner, Inc., a 501(c)(3) set up to develop low-income housing. For more information on the IDA, visit [www.SierraVistaAZ.gov](http://www.SierraVistaAZ.gov).

## Sierra Vista Economic Development Foundation

SVEDF actively promotes and preserves the economic strength of the city through actions focused on business recruitment, expansion, and retention, as well as international business development and alliances. SVEDF offers services and technical assistance to businesses interested in relocating to or expanding in Sierra Vista, including confidential consultations, site location information and assistance, customized research on specific business questions, representation in Sierra Vista's zoning and building permit approval process, private and public financing and job training assistance, support of local business expansions, and international trade and joint venture partnerships.

The goal of SVEDF is to make business start-up or expansion in Sierra Vista as easy and productive as possible. The organization provides resources, information, contacts, and technical expertise to assist in relocating or expanding businesses. As a support and resource organization, SVEDF offers a variety of services and technical assistance to entrepreneurs and professionals interested in making Sierra Vista their business site. Their services are designed to serve new and existing businesses, from sole proprietorship to Fortune 500 firms. To learn more about SVEDF, visit [www.svedf.org](http://www.svedf.org).

## Cost of Living

The ACCRA Cost of Living Index measures relative price levels for consumer goods and services in more than 300 participating areas in all 50 states. The average for all participating places nationwide equals 100 and each participant's index is read as a percentage of the average for all places. The ACCRA index includes separate weighted sub-indices for grocery items, housing, utilities, transportation, healthcare, and miscellaneous goods and services.

The ACCRA Cost of Living Index data indicate Cochise County's average annual cost of living in 2008 was 0.2 percent higher than the average for all participating places nationwide. This was up from 2007 when the cost of living locally was 2 percent below the national average. The cost of living in Cochise County in 2008 was slightly higher than in Tucson—a reversal of the 2007 data which showed the local cost of living was 2.3 percent below that of Tucson. The cost of living in Cochise County remained below that in Phoenix, although the gap narrowed. In 2007, the cost of living in Cochise County was 2.6 percent below that in Phoenix, but this narrowed to 0.9 percent in 2008.

Part of the reason for the higher relative cost of living in Cochise County has been housing costs, which include both home prices and rental rates. As home prices have held relatively steady locally, markets in other areas of the state and nation have seen steep declines. In 2007, the cost of housing in Cochise County was 5.4 percent below the national average. In 2008, local housing costs were 3.1 percent above the national average.

Healthcare costs in Cochise County also increased considerably in 2008 relative to the rest of the nation. In 2007, the cost of healthcare in Cochise County was 2.4 percent below the national average. In 2008, this increased to 0.5 percent above the national average. The local cost of miscellaneous goods and services also increased in 2008, relative to the rest of the nation. In 2007, the cost of miscellaneous goods and services was 4.5 percent below the national average. In 2008, this increased to only 3.6 percent below national averages.

Grocery items, utilities, and transportation costs in Cochise County all declined relative to national averages in 2008. Grocery items, which were 5.5 percent above the national average in 2007, fell to 4.9 percent above the national average in 2008. Utilities,

### COST OF LIVING COMPARISONS

	SIERRA VISTA-DOUGLAS MICRO AREA*	TUCSON	PHOENIX	FLAGSTAFF	LAKE HAVASU	PRESCOTT-PRESCOTT VALLEY	YUMA
2007	98.0	100.3	100.6	115.9	111.2	106.4	102.7
2008	100.2	99.6	101.1	118.3	112.2	107.2	105.4

\*The Sierra Vista-Douglas Micropolitan Area is a statistical area designation for all of Cochise County. Sierra Vista and Douglas are included in the title since they are the principal cities that meet the criteria for establishing Cochise County as a Micropolitan area. Note: The average for all participating places nationwide equals 100 and each participant's index is read as a percentage of the average for all places. Source: Council for Community and Economic Research (C2ER), ACCRA Cost of Living Index.

### SIERRA VISTA/DOUGLAS MICROPOLITAN AREA COST OF LIVING

	COMPOSITE INDEX	GROCERY ITEMS	HOUSING	UTILITIES	TRANSPORTATION	HEALTH CARE	MISC. GOODS & SERVICES
2007	98.0	105.5	94.6	100.7	104.3	97.6	95.5
2008	100.2	104.9	103.1	97.7	100.9	100.5	96.4

Note: The Sierra Vista-Douglas Micropolitan Area is a statistical area designation for all of Cochise County. Sierra Vista and Douglas are included in the title since they are the principal cities that meet the criteria for establishing Cochise County as a Micropolitan area. The average for all participating places nationwide equals 100 and each participant's index is read as a percentage of the average for all places. Source: Council for Community and Economic Research (C2ER), ACCRA Cost of Living Index.

which were priced 0.7 percent higher than the national average in 2007, were 2.3 percent below the national average in 2008. Local transportation costs, which include gasoline and automobile maintenance, declined considerably in 2008 relative to the rest of the nation. In 2007, transportation costs in Cochise County were 4.3 percent above the national average. In 2008, this fell to only 0.9 percent above the national average.

Statewide, there were seven places participating in the ACCRA Cost of Living Index in 2008. In addition to Cochise County, other participating areas included Flagstaff, Lake Havasu City, Phoenix, Prescott-Prescott Valley, Tucson, and Yuma. Of these, only Tucson had an overall cost of living that was lower than Cochise County. The highest cost of living in Arizona was in Flagstaff, which was 18.3 percent above the national average in 2008.

### SIERRA VISTA WEATHER

MONTH	AVG. HIGH	AVG. LOW	MEAN	AVG. PRECIP.	RECORD HIGH	RECORD LOW
January	62°F	34°F	48°F	1.19 in	81°F (1999)	12°F (1987)
February	65°F	36°F	51°F	0.65 in	83°F (1986)	11°F (1985)
March	70°F	41°F	56°F	0.44 in	91°F (1989)	23°F (1985)
April	77°F	46°F	62°F	0.36 in	97°F (1989)	28°F (1999)
May	85°F	53°F	69°F	0.26 in	102°F (2002)	38°F (2003)
June	93°F	62°F	78°F	0.38 in	107°F (1990)	46°F (1991)
July	93°F	66°F	79°F	3.01 in	108°F (1989)	56°F (2004)
August	90°F	64°F	77°F	3.85 in	102°F (1995)	53°F (1992)
September	87°F	60°F	74°F	1.29 in	98°F (1983)	45°F (1985)
October	79°F	50°F	65°F	1.16 in	96°F (1983)	30°F (1996)
November	69°F	40°F	54°F	0.45 in	85°F (1988)	19°F (2004)
December	62°F	34°F	48°F	0.98 in	79°F (1987)	15°F (1987)

Source: The Weather Channel ©

### Climate

Sierra Vista is at an elevation of 4,623 feet. The average monthly temperature ranges from an average low of 34°F in January and December to an average high of 93°F in June and July. The record low of 11°F was observed in February 1985. The record high is 108°F, observed in July 1989. The average monthly precipitation ranges from a low of 0.26 inches in May to a high of 3.85 inches in August.

### Arizona Enterprise Zone Program

Portions of Sierra Vista are located in the Cochise County Enterprise Zone, currently in effect through 2011. This zone also includes the communities of Benson, Bisbee, Douglas, Huachuca City, Tombstone, and Willcox, and surrounding unincorporated areas. Companies that locate to enterprise zones may be eligible to benefit from two tax incentive programs.

The Arizona Enterprise Zone program was enacted in 1989 and revised by subsequent legislation. The goal of the program is to improve the economies in areas of the state with high poverty or unemployment rates by promoting private investment. The program provides income tax credits for non-retail businesses creating new jobs in enterprise zones, and property reclassification for small manufacturers investing in a zone.

The goal of the [Arizona Enterprise Zone] program is to improve the economies of areas in the state with high poverty or unemployment rates by promoting private investment.

In 1993, property tax benefits were added to the program. In 1996, the program was revised to encourage the creation of quality jobs that paid a state-designated wage and for which employers paid 50 percent of health insurance costs. In 1999, legislation was passed to allow insurers to use credits to offset premium taxes. In 2001, the investment threshold for small manufacturers in rural Arizona was lowered, and qualified companies were allowed to conduct up to 10 percent retail activity at the zone location. In 2002, the program was revised to strengthen administrative procedures and help target the program more closely toward its purpose as an economic development tax incentive. In 2006, the program was extended for 5 years and revised to allow certain family-owned manufacturers to qualify under the Enterprise Zone property tax reduction. Additionally, qualified commercial printers using lithography or flexography printing processes are now able to participate in the program.

The Enterprise Zone program provides for an income and premium tax credit for net increases in qualified employment positions at a site located in the enterprise zone, except for those at a business location where more than 10 percent of the activity is the sale of tangible personal property at retail. Tax credits may total up to \$3,000 per qualified employment position over three years, for a maximum of 200 employees in any given tax year. A qualified employment position is a fulltime permanent job

(1,750 hours per year), pays an hourly wage above the “Wage Offer by County” (\$9.48 in 2010 for the Cochise County Enterprise Zone), and provides health insurance to employees for which the employer pays at least 50 percent.

The program also provides for property tax benefits in conjunction with property reclassification for qualified manufacturing businesses locating or expanding facilities in the enterprise zone. A manufacturer in an enterprise zone is eligible for an assessment ratio of 5 percent on all personal and real property (for primary tax purposes only) in the zone for 5 years if it is: (1) either minority-owned, woman-owned, or small (as defined by Enterprise Zone program rules); and (2) makes an investment in fixed assets in the zone of \$500,000 (for cities with a population of less than 15,000) or \$1 million (for cities with a population between 15,000 and 80,000; in Cochise County this includes only Sierra Vista and Douglas as of 2009). For more information on the Enterprise Zone program, contact the Cochise County Enterprise Zone Administrator at (520) 432-9215 or by email at [gmotter@cochise.az.gov](mailto:gmotter@cochise.az.gov), or the Arizona Enterprise Zone Administrator at (602) 771-1236 or visit [www.azcommerce.com](http://www.azcommerce.com).

## Tax Rates

### TRANSACTION PRIVILEGE TAX

Sales (or transaction privilege) tax rates in Sierra Vista vary based on the category of sale. City sales tax is added to a base of 6.1 percent, which includes county and state taxes, for most categories of sales. The general privilege tax rate in Sierra Vista is 1.75 percent for a total (city, county, and state) tax of 7.85 percent. Restaurant and bar sales in the city are taxed at 2.6 percent, for a total tax of 8.7 percent. Hotel, motel, and other transient lodging stays are taxed at 5.5 percent, for a total of 11.55 percent (note: The state and county combined tax for hotel, motel, and other transient lodging stays is 6.05 percent). Utilities and telecommunications sales in the city are taxed at 2 percent, for a total rate of 8.1 percent. Construction contracting is taxed at 2.45 percent, for a total rate of 8.55 percent. In 2006, Sierra Vista added a real property rental tax of 1 percent; real property rentals are not taxed at the county and state levels.



New commercial construction  
in Sierra Vista

### PROPERTY TAX

The combined total of all primary and secondary city, school district, county, state, and other property taxes for real property located in Sierra Vista in 2009-2010 was \$9.4182 per \$100 assessed value. This was down from \$9.6714 in 2008-2009 due to a decrease in tax rates by all local jurisdictions except Cochise County library and flood control, which apply to all real property countywide. The library and flood control taxes were unchanged from 2008-2009 to 2009-2010. The two state-level property taxes—the fire district assistance and school district assistance taxes—both increased from 2008-2009 to 2009-2010. The lower rates by other jurisdictions at the county and city levels were largely in response to an increase in property valuations, which brought in more revenue at lower rates. The property tax rate levied by the City of Sierra Vista in 2009-2010 was \$0.1139 per \$100 of assessed value, the lowest level of any of the incorporated areas of Cochise County.

In Arizona, assessed value is based on an assessment ratio of the property's value. The state uses the following assessment ratios:

- **21 percent:** Mines and mining claim property, and standing timber; local telecommunications service, gas, water, and electric utility company property; pipeline company property producing oil; gas property; and commercial and industrial real property not included in other classes. The assessment ratio for property in this class is scheduled to decline incrementally, reaching 20 percent in 2011.
- **21 percent:** Railroad operating property, private car company property, and airline flight property.

### SIERRA VISTA TRANSACTION PRIVILEGE (SALES) TAX RATES

CATEGORY	COUNTY AND STATE	CITY OF SIERRA VISTA	TOTAL
Privilege Tax	6.10%	1.75%	7.85%
Use Tax - Utilities	6.10%	1.75%	7.85%
Use Tax	5.60%	1.75%	7.35%
Restaurant & Bar	6.10%	2.60%	8.70%
Hotel/Motel	6.05%	5.50%	11.55%
Utilities/Telecommunications	6.10%	2.00%	8.10%
Jet Fuel (per gal.)	\$0.03355	\$0.02	\$0.05355
Rental of Real Property		1.00%	1.00%
Construction Contracting	6.10%	2.45%	8.55%

Note: Rates as of February 1, 2010. Source: Arizona Department of Revenue and Cochise College Center for Economic Research.

- **16 percent:** Agricultural real property, golf courses, and vacant land.
- **10 percent:** Owner-occupied residential property and leased or rented residential property.
- **5 percent:** Noncommercial historic property, foreign trade zone property, qualifying military reuse zone property, qualifying enterprise zone property, qualifying environmental technology property, and qualifying environmental remediation property.
- **1 percent:** Possessor interests; and improvements to commercial historic or historic residential rental property (for up to 10 years).

### Crime Rate

The crime rate in Sierra Vista in 2008 was 33.6 crimes per 1,000 residents, down considerably from 46.3 in 2006 and 40.3 in 2007. In 2008, Sierra Vista's crime rate was lower than the national and state rates, but higher than the county rate.

The crime rate reflects data reported in the Federal Bureau of Investigation's (FBI) Uniform Crime Report and includes violent crimes (murder and non-negligent manslaughter, forcible rape, robbery, and aggravated assault), property crimes (burglary, larceny-theft, and motor vehicle theft), and arson, which is reported separately.

The FBI issues the following caution when using crime rate data: To assess criminality and law enforcement's response from jurisdiction to jurisdiction, one must consider many variables, some of which, while having significant impact on crime, are not readily measurable or applicable pervasively among all locales. Geographic and demographic factors specific to each jurisdiction must be considered and applied if one is going to make an accurate and complete assessment of crime in that jurisdiction. The U.S. Census Bureau data, for example, can be used to better understand the makeup of a locale's population. The transience of the population, its racial and ethnic makeup, its composition by age and gender, educational levels, and prevalent family structures are all key factors in assessing and comprehending the crime issue. Understanding a jurisdiction's industrial/economic base; its dependence upon neighboring jurisdictions; its transportation system; its economic dependence on nonresidents (such as tourists and convention attendees); its proximity to military installations, correctional facilities, etc., all contribute to accurately gauging and interpreting the crime known to and reported by law enforcement. The strength (personnel and other resources) and the aggressiveness of a jurisdiction's law enforcement agency are also key factors in understanding the nature and extent of crime occurring in that area. For example, one city may report more crime than a comparable one, not because there is more crime, but rather because its law enforcement agency through proactive efforts identifies more offenses. Attitudes of the citizens toward crime and their crime reporting practices, especially concerning minor offenses, also have an impact on the volume of crimes known to police.

### Environmental Stewardship

City code requires developers to use water saving devices in new construction, from waterless urinals in commercial buildings to hot water recirculating pumps in new residential construction. City code also prohibits turf in new commercial landscapes in favor of low-water use plants, and limits turf in the front yard of new homes to 200 square-feet. City government follows these guidelines as well, and uses only drought tolerant plants for landscaping in medians and around public buildings. Codes prohibit water misters in commercial development, require new car wash facilities to recycle 75 percent of their water, and require new commercial developments to build on-site detention basins.

### SIERRA VISTA PROPERTY TAX RATES, 2009-2010 (PER \$100 ASSESSED VALUE)

DISTRICT	PRIMARY	SECONDARY	TOTAL
City of Sierra Vista	0.1139		0.1139
Buena Elementary School District	2.1102	0.6935	2.8037
Buena High School District	0.9613	0.4666	1.4279
Cochise County General Government*	2.6425		2.6425
Library*		0.1451	0.1451
Flood Control*		0.2597	0.2597
Cochise College*	1.6075		1.6075
Arizona Fire District Assistance Tax**		0.0873	0.0873
Arizona School District Assistance Tax**	0.3306		0.3306
TOTAL	7.766	1.6522	9.4182

Note: Rates are established the third Monday in August. \*Rate applies to all property in Cochise County. \*\*Rate applies to all property in Arizona. Source: Cochise County Treasurer and Cochise College Center for Economic Research.



The largest water mitigation project in the Sierra Vista sub-watershed is the city's Environmental Operations Park (EOP), which cleans sewer water and returns it through a natural process to the underground aquifer. Since the EOP opened in 2002, more than 12,500 acre-feet (4.1 billion gallons) of water have been returned to the aquifer through recharge. The EOP has 50 acres of wetlands that provide a refuge/habitat for birds and wildlife, making the 1,800 square-foot, wildlife-viewing platform a popular gathering spot for local and visiting birding enthusiasts.

Storm water management is also an integral component of the city's efforts. Sierra Vista does not have a storm water system; instead, city streets and washes serve that purpose as monsoon water rushes toward the San Pedro River. To slow storm water flows, avoid flooding, and allow water to soak into the ground as recharge, the city has built a number of detention basins throughout the community. After water runs off the streets, driveways, parking lots, and sidewalks and into washes and detention basins, it passes through the soil and enters the aquifer. The construction of these basins is typically funded by developers and sometimes by taxpayers.

Sierra Vista is also incorporating conservation goals into building design. The city has implemented water conservation at The Cove, Sierra Vista's aquatic recreation center located in Veterans' Memorial Park. Backwash water from the pool is used to supplement irrigation in the park. In addition, the new band shell that will be located in the same park will include a rainwater capture system that will further supplement park irrigation. All park irrigation in the city is managed by a computerized irrigation system that ties water flow to a weather station that senses humidity, rainfall, and wind, facilitating efficient use of water while maintaining the parks and sports fields.

As of 2010, Sierra Vista also had 1 of only 2 Leadership in Energy and Environmental Design (LEED) buildings in Southeastern Arizona. The Vista Transit Center is a 2,450 square-foot facility that provides many amenities including restrooms and a lounge area for Vista Transit riders. More than 90 percent of the \$1.6 million facility was funded by a Federal Transit Administration grant through the Arizona Department of Transportation. The LEED program, administered by the U.S. Green Building Council, is the nationally accepted rating system for the design, construction, and operation of high performance green buildings. LEED standards promote a whole-building approach to sustainability by recognizing performance in five key areas: sustainable site development, water savings, energy efficiency, materials selection, and indoor environmental quality.

There are several other projects on the horizon. One of the largest is a solar farm at the Environmental Operations Park. The city is soliciting proposals to construct a two megawatt solar array to offset the \$500,000 annual expense of running the two pumps at the facility. Other grant funding and partnerships are being sought for a number of energy efficiency improvements. Projects that are under review include the installation of solar streetlights and solar water heaters in city facilities; purchasing and/or retrofitting some or all of the city's fleet of refuse trucks, transit buses, and light duty vehicles to compressed natural gas powered vehicles; and installing a compressed natural gas fueling facility that may also be open to the public. New technologies will include pilot programs, measurement, data collection, and testing to ensure the innovations can be successfully implemented.

#### CRIME RATE (PER 1,000 RESIDENTS), 2008

LOCATION	POPULATION	VIOLENT CRIME	PROPERTY CRIME	ARSON	TOTAL CRIME	CRIME RATE (PER 1,000 RESIDENTS)
United States	304,059,724	1,382,012	9,767,915	N/A	11,149,927	36.7
Arizona	6,629,455	29,059	278,920	N/A	307,979	46.5
Cochise County	139,434	N/A	N/A	N/A	N/A	*32.1
Benson	5,030	10	154	0	164	32.6
Bisbee	6,389	48	254	1	303	47.4
Douglas	18,207	31	656	1	688	37.8
Huachuca City	1,952	6	39	4	49	25.1
Sierra Vista	45,908	111	1,418	13	1,542	33.6
Tombstone	1,709	N/A	N/A	N/A	N/A	N/A
Willcox	3,904	15	173	10	198	50.7
Unincorporated Areas	56,336	446	1,027	10	1,483	26.3

N/A = Data not available. \*Estimated by the Cochise College Center for Economic Research based on reporting for all areas except Tombstone. Source: Federal Bureau of Investigation, Uniform Crime Reports; U.S. Census Bureau; Arizona Department of Commerce; and Cochise College Center for Economic Research.

#### SIERRA VISTA CRIME RATE (PER 1,000 RESIDENTS)

2004	37.8
2005	36.9
2006	46.3
2007	40.3
2008	33.6

Source: Federal Bureau of Investigation, Uniform Crime Reports; U.S. Census Bureau; Arizona Department of Commerce; and Cochise College Center for Economic Research.



The new  
student union  
building at Cochise  
College Sierra  
Vista campus



## Education

### Primary and Secondary Education

#### SIERRA VISTA UNIFIED SCHOOL DISTRICT

The Sierra Vista Unified School District (SVUSD) consists of one high school, two middle schools, and six elementary schools. Average daily membership (ADM) at the district level increased from the 2004-2005 to the 2005-2006 school year, but since then has declined considerably. ADM is a prime determinant of state-level funding.

The K-12 school district has programs for advanced and gifted students and English Language Learners (ELL), as well as those who need special preschools or have special needs. At all levels, activities are designed to meet the various interests of a diverse student population. High school career-technical programs include accounting and financial services, automotive technology and repair, business technology, computer maintenance and repair, construction, culinary arts, drafting, early childhood development, education professions, commercial and graphic arts, marketing, photo imagery, radio and television, programming and network development, theater technology, and web design. Partnerships with Cochise College include programs in health services, welding, avionics, engineering and numerous other career programs. Also available is Junior Reserve Officer Training Corps (JROTC), as well as advanced placement classes in English, mathematics, science, psychology, geography, art, music, and history. Interscholastic sports, Knowledge Bowl, Speech and Debate, Odyssey of the Mind, Robotics, National History Day, Academic Decathlon competitions, and a variety of service and special interest clubs are available at the middle schools and high school. Gifted programs as well as many other before- and after-school programs are offered at the elementary school level.

Arizona Learns, a program within the Arizona Department of Education, evaluates each

Arizona school and assigns a rating with respect to the school's ability to meet or exceed the Arizona Standards of Education. The ratings include: excelling, highly performing, performing plus, performing, and underperforming. Ratings are issued each fall term for the previous year. For the 2008-2009 school year, Pueblo del Sol Elementary was rated excelling, Buena High School and Huachuca Mountain Elementary were rated highly performing, and all others were rated performing plus.

In fiscal year 2008, the student/teacher ratio in SVUSD was 16.4, down from 17.1 in 2007 and 18.0 in 2006. The district's student/teacher ratio in 2008 was lower than the statewide average of 17.3. The average years of experience for teachers in the SVUSD in 2008 was 9.4, compared to 8.1 statewide.

SVUSD spent an average of \$7,516 per student in 2008, which was 3.8 percent below the statewide average of \$7,813. The district spent 54.3 percent of per pupil dollars, or \$4,077, in the classroom, which was below the statewide average of 57.3 percent or \$4,480. Of Arizona's 230 school districts, SVUSD was ranked 133rd for classroom dollars.

Non-classroom per pupil expenditures in the district totaled \$3,439, or 45.7 percent of total per pupil spending in 2008. Statewide, non-classroom per-pupil spending averaged \$3,333, or 42.7 percent of the total. Non-classroom spending includes administration, plant operations, food service, transportation, student support, and instruction support.



The new Berean Academy charter school campus in Sierra Vista

#### FORT HUACHUCA ACCOMMODATION SCHOOLS

Fort Huachuca Accommodation Schools (FHAS) consists of one middle school and two elementary schools. FHAS are Arizona public schools that fall under the Arizona Department of Education. The schools are not Department of Defense Dependent Schools (DoDDS). The school district is under the direction of a 5-person appointed governing board. The district is administered by a district superintendent. Financial support for FHAS is derived from state aid and federal impact aid.

Although not under the jurisdiction of the military command, the district has a close working relationship with the garrison commander's office and other military groups on post. A school liaison officer works closely with the district, the individual schools, parents, and the military to enhance the partnerships with the goal of promoting successful student growth and achievement.

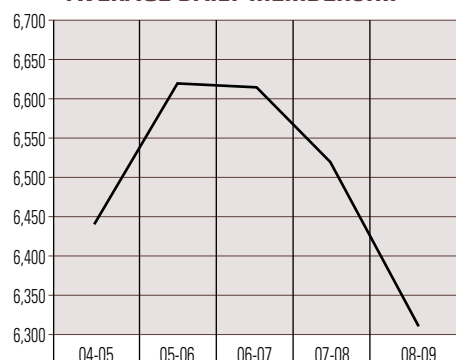
The FHAS curriculum has been aligned to the Arizona state standards and the district has incorporated the standards into instructional practices in the classrooms. The major teaching emphasis is placed on the basic fundamentals while providing a foundation for students to build

#### SIERRA VISTA UNIFIED SCHOOL DISTRICT, ARIZONA LEARNS RATINGS

SCHOOL	2008-2009	2007-2008
Buena High School (9-12)	Highly Performing	Performing
Apache Middle School (6-8)	Performing Plus	Performing Plus
Joyce Clark Middle School (formerly Sierra Vista Middle School) (6-8)	Performing Plus	Performing Plus
Bella Vista Elementary (K-5)	Performing Plus	Performing Plus
Carmichael Elementary (K-5)	Performing Plus	Performing Plus
Huachuca Mountain Elementary (K-5)	Highly Performing	Performing Plus
Pueblo del Sol Elementary (K-5)	Excelling	Highly Performing
Town & Country Elementary (K-5)	Performing Plus	Performing Plus
Village Meadows Elementary (K-5)	Performing Plus	Performing Plus

Source: Arizona Department of Education.

#### SIERRA VISTA UNIFIED SCHOOL DISTRICT AVERAGE DAILY MEMBERSHIP



Note: Reflects total attending average daily membership. Source: Arizona Department of Education.

### FORT HUACHUCA ACCOMMODATION SCHOOLS, ARIZONA LEARNS RATINGS

SCHOOL	2008-2009	2007-2008
Colonel Smith Middle School (6-8)	Highly Performing	Highly Performing
General Myer Elementary School (3-5)	Performing Plus	Highly Performing
Colonel Johnston Elementary School (pre-K-2)	Highly Performing	Excelling

Source: Arizona Department of Education.

### SIERRA VISTA CHARTER SCHOOLS, ARIZONA LEARNS RATINGS

SCHOOL	2008-2009	2007-2008
The Berean Schools (K-12)	Performing	Performing
Center for Academic Success #1 (9-12)	Performing	Performing
PPEP-TEC Colin L. Powell Learning Center (9-12)	Performing	Performing
Imagine Charter School at Sierra Vista (K-8)	Performing Plus	Performing
Center for Academic Success #5 (K-5)	Performing Plus	Performing

Source: Arizona Department of Education.

### SIERRA VISTA PRIMARY AND SECONDARY SCHOOL ENROLLMENT

SCHOOL	2006-2007	2007-2008	2008-2009
<b>Sierra Vista Unified School District</b>	<b>6,905</b>	<b>6,831</b>	<b>6,629</b>
Apache Middle School (6-8)	728	693	652
Bella Vista Elementary School (K-5)	431	431	419
Buena High School (9-12)	2,785	2,721	2,577
Carmichael Elementary School (K-5)	410	390	377
Huachuca Mountain Elementary School (K-5)	567	553	540
Pueblo Del Sol Elementary School (K-5)	481	519	542
Joyce Clark Middle School (formerly Sierra Vista Middle School) (6-8)	649	643	609
Town & Country Elementary School (K-5)	473	450	423
Village Meadows Elementary School (K-5)	381	431	490
<b>Fort Huachuca Accommodation District</b>	<b>1,046</b>	<b>1,143</b>	<b>1,104</b>
Colonel Johnston Elementary School (pre-K-2)	372	425	403
Colonel Smith Middle School (6-8)	323	348	342
General Myer Elementary School (3-5)	351	370	359
<b>Charter Schools</b>	<b>942</b>	<b>953</b>	<b>N/A</b>
The Berean Schools (K-10)	224	239	255
Center for Academic Success #5 (K-5)	61	67	113
Center for Academic Success #1 (9-12)	165	157	N/A
Imagine Charter School at Sierra Vista (K-8)	435	435	420
PPEP-TEC Colin L. Powell Learning Center (9-12)	57	55	20

N/A = Data Not Available. Note: Figures reflect enrollment as of October 1 of each school year. Source: Arizona Department of Education.

upon by continuing their learning and inquiry throughout their lifetimes. A certified principal administers each school, and each school employs a registered nurse. ELL coordinators, speech therapists, and counselors work at all three school sites.

Under Arizona Learns, Colonel Johnston Elementary and Colonel Smith Middle School were rated highly performing while General Myer Elementary was rated performing plus for the 2008-2009 school year.

### CHARTER SCHOOLS

In addition to SVUSD and the FHAS, Sierra Vista also has five charter schools, which have had a combined enrollment of more than 900 students in recent years. For the 2008-2009 school year, Imagine Charter School at Sierra Vista and the Center for Academic Success #5 were rated performing plus while the others were rated performing under Arizona Learns. In 2008, the Center for Academic Success constructed a new \$7 million, 9-acre campus in Sierra Vista.

### Post-secondary Educational Opportunities

#### COCHISE COLLEGE

Cochise College is a two-year institution “serving the education needs of Cochise County, the State of Arizona, and the world.” The college’s academic programs include aviation, nursing, welding, computers, English, and Spanish. Its athletic programs draw students from throughout the southwest United States and beyond. Students can earn an associate degree and gain experience that will prepare them to complete a bachelor’s degree at a four-year institution.

Cochise College classes have been offered in the Sierra Vista/Fort Huachuca area since the 1960s. By 1972, college instructors were teaching courses in temporary buildings at Buena High School. In 1974, the Andrea Cracchiolo family donated 40 acres of land east of Sierra Vista for the future site of the Sierra Vista Campus. The campus opened in 1978. To meet the needs of a growing student population, ground was broken on the Andrea Cracchiolo Library and the science building in September 1994. Today, the campus provides a diverse curriculum of general education, transfer, and occupational programs, including computer science, nursing, business, theater, welding, and manufacturing engineering. It is located in close proximity to apartments, shopping, dining, University of Arizona South, and Buena High School. In addition to its Sierra Vista Campus, the college offers classes in Benson, Bisbee, Douglas, Fort Huachuca, Willcox, and in outlying areas. Classes are also offered online and in neighboring Santa Cruz County.

In 2008, the college broke ground on a number of capital improvement projects district-wide. In 2008 and 2009, work at the Sierra Vista Campus included a \$2.5 million addition to the science building, which added 7,500 square feet of labs, classrooms, and preparation and storage space; a new \$3.4 million, 15,000 square-foot career-technical education building to accommodate welding,

building/construction technology, and other technical programs; a learning center housing computer labs, tutoring services, group study rooms, and offices; a new student

union building housing admission and registration services, the college bookstore, food service, and a community meeting room; and numerous other renovations and site improvements.

Cochise College is accredited by the Higher Learning Commission of the North Central Association. In 2006, Cochise College earned the maximum reaccreditation of 10 years as the result of an exceptional evaluation by the visiting accreditation team. To learn more about Cochise College, visit [www.cochise.edu](http://www.cochise.edu).

### UNIVERSITY OF ARIZONA SOUTH

The University of Arizona established UA South in Sierra Vista, an official branch campus of the university, as part of its land grant mission to serve the citizens of the State of Arizona. The mission of UA South is “to provide quality liberal arts and professional instruction that allow the citizens of the State, and primarily Cochise County, to obtain degrees and develop fully their intellectual and professional capabilities as well as gain an appreciation of diversity; to enrich instruction through the integration of technology in resident and distance learning programs; and to foster regional economic development and provide expertise for generating solutions to community problems through the education and public service activities of faculty, staff, and students.”

UA South offers upper-division courses for students to complete undergraduate degree programs in cooperation with Cochise College and other Arizona community colleges. Graduate degrees are also offered in select disciplines. UA South is a commuter campus, with schedules designed to accommodate working adults and returning students. Throughout Arizona, students may also take advantage of UA South courses available online.

In addition to its campus in Sierra Vista, UA South maintains a campus in Douglas, serving the needs of Southeast Cochise County and Northern Mexico, and an office on Fort Huachuca. For more information, visit [www.uas.arizona.edu](http://www.uas.arizona.edu).

### UNIVERSITY OF PHOENIX

The Southern Arizona Campus of the University of Phoenix has learning center campus locations in Sierra Vista and on Fort Huachuca. The Southern Arizona Campus allows students to earn their college degree while maintaining their personal and professional commitments. University of Phoenix classes are scheduled in the evenings, and the university is committed to providing higher education to working professionals. University of Phoenix offers professional level undergraduate degrees in business, accounting, administration, information systems, management, and nursing, along with graduate degrees in business, counseling, information systems, technology management, management, nursing, and education. For more information, visit [www.universityofphoenix.com](http://www.universityofphoenix.com).

### WAYLAND BAPTIST UNIVERSITY

Wayland Baptist University has campus locations in Sierra Vista and on Fort Huachuca. Wayland is a private, coeducational Baptist university and seeks to educate students in an academically challenging and distinctively Christian environment. The majority of Wayland's undergraduate and graduate programs cater to the working adult student, to include military, border patrol, and other government employees. Undergraduate programs include a Bachelor of Science in Occupational Education degree; Bachelor of Science in Interdisciplinary



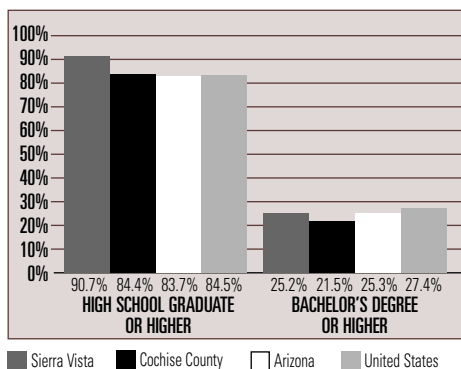
Pueblo del Sol elementary school received an Arizona Learns rating of Excelling for the 2008-2009 school year

#### DISTRIBUTION OF PER PUPIL SPENDING

	SIERRA VISTA UNIFIED SCHOOL DISTRICT	ARIZONA	UNITED STATES
Classroom Dollars	54.3	57.3	61.0
Non-classroom Dollars	45.7	42.7	39.0
Administration	10.9	9.2	10.8
Plant Operations	13.6	11.3	9.9
Food Service	4.3	4.8	3.8
Transportation	4.6	4.4	4.2
Student Support	6.7	7.4	5.2
Instruction Support	5.6	5.4	4.9
Other	0.0	0.2	0.2

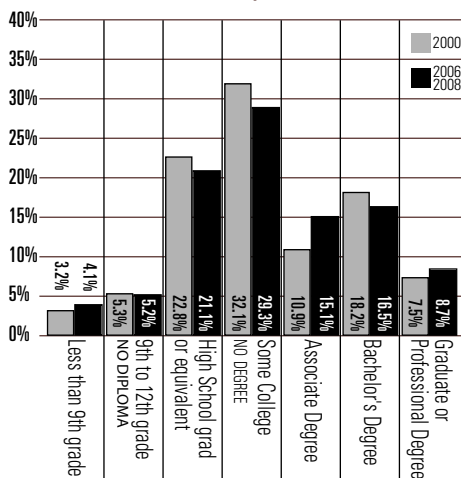
Note: Numbers shown are percentages of total per pupil spending. Data for the Sierra Vista Unified School District and Arizona are from 2008; national figures are from 2006. Source: State of Arizona, Office of the Auditor General.

### EDUCATIONAL ATTAINMENT COMPARISONS, 2006-2008



Note: Population 25 years and older. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates; and Cochise College Center for Economic Research.

### SIERRA VISTA EDUCATIONAL ATTAINMENT, 2000-2008



Note: Population 25 years and older. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates; and Cochise College Center for Economic Research.

Studies degree; and Bachelor of Christian Ministry degree. Graduate programs include a Master of Christian Ministry and a Master of Arts in Management. For more information, visit [www.wbu.edu](http://www.wbu.edu).

### WESTERN INTERNATIONAL UNIVERSITY

Western International University (WIU) has a campus located on Fort Huachuca. WIU provides a broad educational foundation, including a focus on business and technology, designed to prepare students for leadership positions in a dynamic, global marketplace. WIU seeks to provide education programs to a student population that includes working adults and international students, in a format and at times and locations conducive to the education of the student population. The university seeks to provide programs that meet the educational needs identified by industry, government, and other institutions of higher education in the community. WIU also seeks to provide students with an education that blends practical experience with a strong theoretical framework, and an international educational environment through the implementation of global-oriented curriculum. For more information, visit [www.wintu.edu](http://www.wintu.edu).

### Educational Attainment

According to the U.S. Census Bureau, 90.7 percent of Sierra Vista's population aged 25 years and older has at least a high school diploma or equivalent, based on sample data from 2006 to 2008. This is considerably above the countywide, statewide, and national averages. Approximately 25.2 percent of Sierra Vista residents hold a bachelor's degree or higher, compared to 21.5 percent for the county, 25.3 percent statewide, and 27.4 percent nationwide.

Between Census 2000 and the 2006-2008 American Community Survey sample data, the proportion of Sierra Vista residents with less than a 9th grade education increased from 3.2 to 4.1 percent. It is important to note, however, that the increase is within the margin of error of the sample data; thus, it is possible that the true number increased or decreased slightly, or remained the same. Over the same period, the proportion of residents with a 9th to 12th grade education, but without a high school diploma, decreased slightly from 5.3 to 5.2 percent. The proportion of high school graduates (or equivalent) decreased from 22.8 to 21.1 percent, and the proportion of residents with some college but no degree decreased from 32.1 to 29.3 percent. The proportion of residents with an associate degree increased from 10.9 to 15.1 percent of the city's population, the proportion of residents with a bachelor's degree decreased from 18.2 to 16.5 percent, and the proportion of residents with a graduate or professional degree increased from 7.5 to 8.7 percent. Based on the margins of error of the 2006-2008 sample data, the only category that saw a statistically significant change was those earning an associate degree, which increased from 10.9 to 15.1 percent of the population aged 25 years and older.



Sierra Vista  
Regional Health  
Center

## Healthcare

### Sierra Vista Regional Health Center

Sierra Vista Regional Health Center (SVRHC) offers state of the art technology, modern facilities, newly expanded maternal child unit with birthing suites, a Level II nursery, intensive care and medical surgical departments, the latest in diagnostics, complete rehabilitation services, and a free-standing ambulatory surgery center. SVRHC maintains an 86-bed, Joint Commission-accredited acute care facility and has 70 active, 37 courtesy, and 9 Allied Health physicians. SVRHC serves more than 40,000 residents in Sierra Vista, Fort Huachuca, and Cochise County, and reports more than 7,600 patient visits, 1,400 births, 28,000 emergency room visits, and 375,000 tests performed each year.

In 2005, SVRHC completed an emergency department expansion, which doubled the size of the department and added a “fast-track” area to speed the processing of patients requiring lower levels of care. The emergency department added a new x-ray machine and four telemetry beds bringing the total to 14. The nursing station was renovated and new services were implemented including dialysis, a sleep lab, and positron emission tomography (PET)/computed tomography (CT).

In 2007, SVRHC renovated its medical surgical department adding a second nursing station, a private patient room, a treatment room, a new visitor waiting room, a medication room for each nursing station, a staff conference room, and space for the new clinical information system. Also in 2007, Trauma Telemedicine equipment was installed, which provides a real-time connection to trauma doctors at the University Medical Center in Tucson.



### HOSPITAL MILEAGE CHART

	Benson Hospital	Copper Queen Community Hospital	Holy Cross Hospital	Northern Cochise Community Hospital	Northwest Medical Center	Southeast Arizona Medical Center	Sierra Vista Regional Health Center	St. Joseph's Hospital	St. Mary's Hospital	Tucson Medical Center	Tucson Heart Hospital	University Medical Center	University Physician Hospitals
Benson Hospital	0	52	75	37	67	72	35	45	49	49	58	48	43
Copper Queen Community Hospital	52	0	91	86	118	22	27	95	100	99	108	99	94
Holy Cross Hospital	75	91	0	110	84	111	64	72	67	73	75	70	65
Northern Cochise Community Hospital	37	86	110	0	103	72	71	80	85	84	93	84	79
Northwest Medical Center	67	118	84	103	0	137	94	21	16	18	11	15	25
Southeast Arizona Medical Center	72	22	111	72	137	0	47	115	120	119	128	118	114
Sierra Vista Regional Health Center	35	27	64	71	94	47	0	72	77	77	86	76	71
St. Joseph's Hospital	45	95	72	80	21	115	72	0	10	3	11	6	8
St. Mary's Hospital	49	100	67	85	16	120	77	10	0	9	8	5	10
Tucson Medical Center	49	99	73	84	18	119	77	3	9	0	8	4	8
Tucson Heart Hospital	58	108	75	93	11	128	86	11	8	8	0	5	10
University Medical Center	48	99	70	84	15	118	76	6	5	4	5	0	5
University Physician Hospitals	43	94	65	79	25	114	71	8	10	8	10	5	0

Source: Cochise College Center for Economic Research.

### AMBULATORY SURGERY SERVICES

Ambulatory surgery services at SVRHC include endoscopy, general surgery (including respiratory, digestive, abdominal, and vascular system), gynecological surgery, orthopedics, otolaryngology (ear, nose, and throat procedures), urology (specializing in kidney, urinary system, and prostate procedures), manometry, and podiatry. The cardiopulmonary services department provides newborn, pediatric, adolescent, adult, and geriatric services, including arterial blood gas analysis, nebulizer/aerosol therapy, electrocardiograms, pulmonary function studies, cardiac stress testing, chest physiotherapy, bronchoscopy, mechanical ventilation, lung expansion therapy, oxygen therapy, CPAP and BiPAP therapy, pulse oximetry, pulmonary rehabilitation, cardiac rehabilitation, and arterial line insertion.

### DIAGNOSTIC IMAGING

SVRHC's diagnostic imaging department offers state-of-the-art diagnostic services and employs specially trained and licensed technologists certified in X-ray, CT, magnetic resonance imaging (MRI), PET/CT, nuclear medicine, ultrasound, and mammography. All areas of diagnostic imaging provide coverage 24 hours a day, 7 days a week, for emergency services. Specialized medical equipment and procedures include a full range of diagnostic radiology (X-ray) services with X-ray technologists on duty 24 hours a day; multi-slice CT scanner, which includes diagnostics, biopsies, trauma, vascular services, and QCT bone density tests; MRI services in complete diagnostics and vascular studies; PET/CT; nuclear medicine; ultrasound (sonography) services; and full service mammography.

### INFUSION SERVICES

Infusion services offered by SVRHC include blood transfusions, hydration/infusion (e.g., Remicade, Venofer, Zometa, Aredia, IVIG, and antibiotics), injections (e.g., antibiotics, Aranesp, Procrit, Leukine, Neupogen, and Neulasta), central line maintenance/lab draws, wound care without debridement, and phlebotomies.

### CRITICAL CARE SERVICES

Critical care services include an eight-bed intensive care unit, 12-bed telemetry (step-down) unit, and cardiac catheterization laboratory. The entire hospital team consisting of respiratory

therapists, clinical dietitians, diagnostic imaging technicians, case managers, social workers, medical technicians, pharmacists, surgical services, and rehabilitation specialists support critical care when needed. Helicopter services provided by LifeNet are based at SVRHC and are staffed by flight nurses and professional pilots who are certified in emergency care. Ground transportation, staffed by certified paramedics and emergency medical technicians, is readily available.

### LABORATORY SERVICES

SVRHC's full-service laboratory is accredited by the Joint Commission for Accreditation of Healthcare Organizations and the College of American Pathologists. It is under the direction of a board-certified pathologist and has two full-time pathologists. Registered medical technologists and other lab professionals assist the clinician in the diagnosis and management of patients. The SVRHC laboratory actively participates in a nationally certified inter-laboratory survey program in which the laboratory is evaluated in relationship to a nationwide peer group. The laboratory has been recognized for its discovery of a new and rare strain of salmonella. The strain was named Salmonella Cochise, serotype 18:b:1,7. This strain has been confirmed and recorded by the Centers for Disease Control and was forwarded to the International Center in Paris, France.

### MATERNAL CHILD SERVICES

The SVRHC maternal child unit delivers more than 1,400 babies each year. The unit, which was expanded in 2004, offers an atmosphere of low lighting and private birthing rooms. There is an on-unit surgical suite to facilitate quick and efficient return to a private room. Babies can "room in" with the mother and rooms are equipped with specialty beds, comfortable chairs that lay flat for guest sleeping, telephones, color TV with cable service, and large windows. All rooms are equipped with state-of-the-art fetal monitors that allow observation in the room or at the nurses' station. The SVRHC nursery is certified by the Arizona Perinatal Trust as a Level II nursery. The maternal child unit is supported by a staff of registered nurses, licensed practical nurses, certified technicians, and prenatal instructors. Supporting the nursing team are clinical professionals from cardiopulmonary, rehabilitation, laboratory, radiology, nutrition and food services, and pharmacy. The maternal child unit has received a Johnson & Johnson Childbirth Nursing Award. Healthy Families Arizona recognized the unit in 2002 with the "Ounce of Prevention" and "2002 Community Partners" awards.

### MEDICAL/SURGICAL

The medical/surgical department is SVRHC's largest department, offering care before and after surgery, observation, recuperation during and after illness, disease management, and wound care. The fully licensed and certified staff includes registered nurses, licensed practical nurses, and certified nursing assistants. The entire hospital team consisting of respiratory therapists, clinical dietitians, diagnostic imaging technicians, case managers, social workers, medical technicians, pharmacists, surgical services, and rehabilitation specialists provide support when needed. The staff receives training in the latest in healthcare equipment, cardiopulmonary resuscitation (CPR), advanced cardiac life support (ACLS), pediatric advanced life support, and neonatal stabilization. Patient rooms are semi-private and include remote controlled televisions connected to cable, telephones (TTY equipment available, upon request), restrooms, fully adjustable beds, individual climate controls, and an intercom system.

### MEDICAL TELEMETRY/PEDIATRICS

The medical telemetry/pediatrics department offers care before and after surgery, observation, recuperation during and after illness, disease management, and wound care. The medical telemetry



VA Outpatient Clinic

unit cares for cardiac patients who require cardiac monitoring for electrolyte imbalance. They also care for patients who require chemotherapy, COPD, CHF and GI bleeds. For pediatric patients, the department offers oxygen saturation monitoring in addition to basic services. The fully licensed and certified staff includes registered nurses, licensed practical nurses, and certified nursing assistants. The entire hospital team consisting of respiratory therapists, clinical dietitians, diagnostic imaging technicians, case managers, social workers, medical technicians, pharmacists, surgical services, and rehabilitation specialists provide support when needed. The staff receives training in the latest in healthcare equipment, CPR, ACLS, and pediatric advanced life support.

### **NUTRITION AND FOOD SERVICES**

Nutrition outpatient services include medical nutrition therapy provided by a registered dietitian to help manage diseases/conditions, minimize medical complications, reduce medication use, reduce hospital admissions and doctor visits, improve overall quality of life, and promote understanding of food and drug interactions. SVRHC provides individualized medical nutrition therapy for all age groups, from pediatrics to geriatrics, and for a variety of conditions including (but not limited to) diabetes (Type 1, Type 2, and gestational), heart disease, kidney disease, weight management, pre/post-gastric bypass, food allergies, food intolerances, tube feeding, general nutrition, and gastrointestinal disorders. SVRHC offers an adult weight -management program for individuals struggling with weight control. This is a 5-week program that includes an individualized weight-loss plan designed by a registered dietitian. Nutrition inpatient services include menus that reflect appropriate dietary considerations and include selection of food preferences. Recently updated menus reflect today's healthy lifestyle choices for patients on regular therapeutic diets.

### **REHABILITATION**

SVRHC's rehabilitation services department is a regional provider offering a range of rehabilitation programs. The staff includes licensed and certified physical, occupational, and speech therapists, assistants, and support professionals who provide services to patients of all ages and health conditions and treat the consequences of disease or injury by addressing impairments, functional limitations, and disabilities. The department treats patients with orthopedic conditions, neurologic conditions, acute and general medical conditions, wounds, diabetes, connective tissue conditions, chronic pain, cardiopulmonary/circulatory conditions, amputations, lymphedema, athletic/sports injuries, industrial injuries, hand/wrist/elbow injuries, speech/language conditions, cognitive disorders, and voice disorders. Specialty programs include certified manual therapy, aquatic therapy, wound management, pediatric intervention, hand therapy, functional capacity evaluations, work conditioning/industrial rehabilitation, preoperative teaching classes (TKA & THA), pre-feeding skills, tongue thrust correction, and videofluoroscopy swallow evaluation.

SVRHC is licensed by Medicare and the State of Arizona, and is accredited by the Joint Commission on Accreditation of Healthcare Organizations. SVRHC treats all patients, regardless of their ability to pay and strictly adheres to the tenets of the Emergency Medical Treatment and Active Labor Act. For more information, visit [www.svrhc.org](http://www.svrhc.org).

### **Veterans Administration Outpatient Clinic**

In July 2007, the 10,000 square-foot Veterans Administration (VA) Outpatient Clinic opened in Sierra Vista to meet the healthcare needs of eligible veterans living in southeastern Arizona. Previously, the clinic was located in a 2,600 square-foot area in the basement of the Raymond W. Bliss Army Health Center on Fort Huachuca. The clinic's services include education, eligibility and enrollment, health maintenance, health promotion, health screening, laboratory, management of acute and chronic diseases, mental health, nutrition, optometry services, physical therapy, primary care, radiology, returning combat veterans program, social work, and routine/urgent care procedures including dermatologic procedures, skin tests, dressing changes, and immunizations. For more information, visit [www.tucson.va.gov/CBOCs/SierraVista.asp](http://www.tucson.va.gov/CBOCs/SierraVista.asp).



Our Lady of the  
Sierras  
Photo: City of  
Sierra Vista

## Demographics

### Population Estimates and Projections

The population of Sierra Vista as of July 2009 was 46,597, according to estimates by the Arizona Department of Commerce (ADOC). This was up 1.5 percent from 2008. From 2000 to 2009, Sierra Vista's population grew by 23.4 percent, for an average annual growth rate of 2.4 percent. This was considerably below the statewide annual growth rate of 3 percent, but ahead of the countywide rate of 2 percent. Although the state of Arizona overall has grown faster than Sierra Vista since 2000, Sierra Vista grew at a faster rate in 2008 and 2009. The recession that began in December 2007 has slowed migration to Arizona overall, but this has been less so in Sierra Vista. Based on its population size, Sierra Vista ranked as the 17th largest incorporated sub-county area in Arizona in 2009, its same ranking as in 2008.

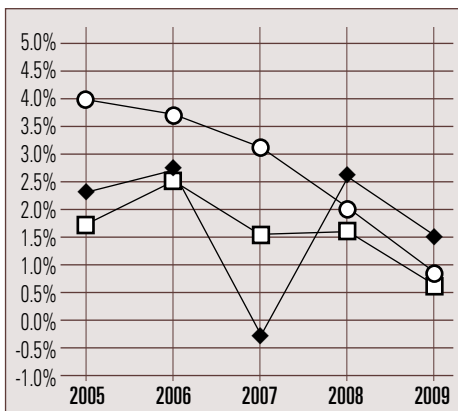
Sierra Vista's population includes the population of Fort Huachuca. This is the result of the city's annexation of the fort in 1971. As of September 30, 2009, the resident population of Fort Huachuca was approximately 6,791, which included 1,045 military personnel and 2,805 military family members residing in on-post housing, along with 2,941 unmarried or unaccompanied military personnel residing in troop billets, including students assigned temporarily to the fort for training. Many military personnel and their families also reside in Sierra Vista and surrounding communities. In 1995, Fort Huachuca launched a redevelopment project for its family housing areas. The project, which is scheduled to be completed in 2013, involves the demolition and replacement of existing units. The net effect will be a reduction of housing units from 1,794 in 2001 to approximately 1,075 in 2014. The net decline will result from the demolition of older housing units and the construction of fewer units to replace them. This may result in an increased demand for off-post housing in Sierra Vista and surrounding communities. Housing communities on post will be developed and homes will be constructed by private-sector firms as part of the Army's

housing privatization efforts under its Residential Communities Initiative.

Although the population of Sierra Vista, including Fort Huachuca, is 46,597, the Sierra Vista area includes nearby populated areas that create a community of more than 75,000, according to estimates by the Arizona Department of Commerce. This includes the City of Sierra Vista, including Fort Huachuca; the Sierra Vista Southeast Census Designated Place, which includes the Hereford/Palominas area; the Town of Huachuca City; the City of Tombstone; the unincorporated area of Whetstone; and surrounding unincorporated areas. The population of this wider Sierra Vista area is projected to reach 100,000 in 2028.

The steady population growth in Sierra Vista in the early 2000s was fueled by the increasing number of military and civilian personnel at Fort Huachuca, along with increases in defense contractor personnel to support the fort's missions. In recent years, the fort has seen an increase in the demand for intelligence soldiers, who are trained at the fort. In early 2010, it was announced that a 500-person signal battalion assigned to the fort would be relocated to Fort Bliss, Texas. This will result in a decline in Fort Huachuca's related population (i.e., the population residing both on and off post, to include military personnel and their family members) of nearly 1,700, according to household size data from Census 2000. This will be largely offset by recent increases in the fort's population, including the number of soldiers trained each year and the associated military and civilian personnel to support that training. Another contributor to the city's population growth in recent years has been an increasing number of retirees, evidenced by the rapid growth of the city's population above the age of 65 and an increase in the share of households receiving retirement income (from 28.5 percent in 2000 to 37.9 percent in 2006-2008).

## POPULATION GROWTH COMPARISONS



Source: Arizona Department of Commerce and Cochise College Center for Economic Research.

◆ Sierra Vista  
 □ Cochise County  
 ○ Arizona

## POPULATION PROJECTIONS

YEAR	COCHISE COUNTY	CITY OF SIERRA VISTA	SIERRA VISTA AREA*
2010	146,037	49,694	77,068
2011	148,672	50,805	78,656
2012	151,258	51,895	80,215
2013	153,784	52,959	81,738
2014	156,247	53,997	83,222

\*Includes City of Sierra Vista, Sierra Vista Southeast CDP, Huachuca City, Tombstone, Whetstone, and surrounding areas. Source: Arizona Department of Commerce and Cochise College Center for Economic Research.

## ARIZONA'S 20 LARGEST INCORPORATED PLACES BY POPULATION SIZE, 2009

RANKING	PLACE	POPULATION
1	PHOENIX	1,575,423
2	TUCSON	543,566
3	MESA	461,102
4	GLENDALE	249,197
5	CHANDLER	245,087
6	SCOTTSDALE	243,501
7	GILBERT	217,521
8	TEMPE	174,833
9	PEORIA	158,712
10	SURPRISE	109,482
11	YUMA	94,361
12	AVONDALE	76,900
13	FLAGSTAFF	65,522
14	GOODYEAR	61,916
15	LAKE HAVASU CITY	55,502
16	BUCKEYE	52,764
17	SIERRA VISTA	46,597
18	CASA GRANDE	45,993
19	PRESCOTT	43,573
20	ORO VALLEY	43,521

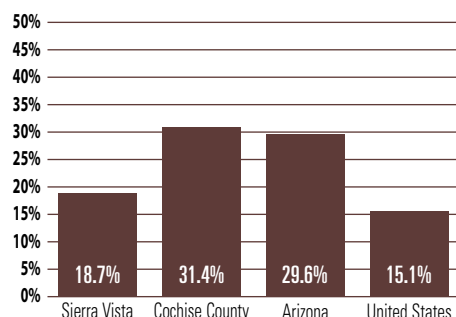
Source: Arizona Department of Commerce.

## Race and Ethnicity

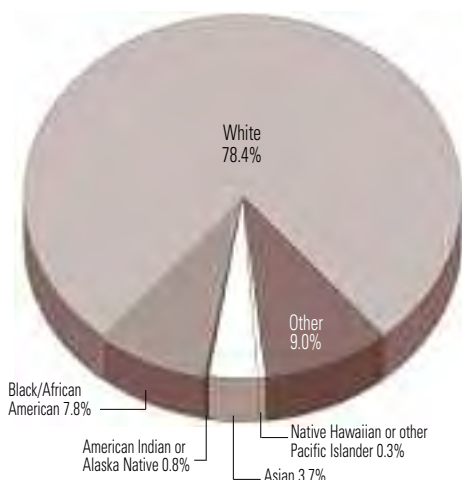
According to data from the U.S. Census Bureau, 18.7 percent of Sierra Vista's population in 2006-2008 was Hispanic or Latino (of any race), up from 15.8 percent in 2000. Sierra Vista's 2006-2008 Hispanic/Latino population was considerably below that of the county and state, which had Hispanic/Latino populations of 31.4 and 29.6 percent, respectively. Nationally, Hispanics/Latinos accounted for 15.1 percent of the total population.

Sierra Vista's population in 2006-2008 was 78.4 percent White, 7.8 percent Black or African American, 0.8 percent American Indian or Alaska Native, 3.7 percent Asian, 0.3 percent Native Hawaiian or other Pacific Islander, and 9 percent other (including two or more races combined). From 2000 to 2006-2008, the fastest growing racial group in Sierra Vista was those classifying themselves as White, which grew from 73.3 to 78.4 percent of the city's population. This followed a considerable decline in the 1990s. Those classifying themselves as other (including two or more races combined), after increasing sharply during the 1990s, declined from 10.9 to 9.0 percent of the city's population between Census 2000 and the 2006-2008 American Community Survey

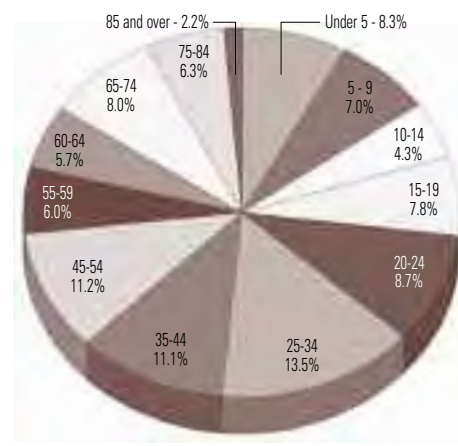


**HISPANIC/LATINO POPULATION,  
2006-2008**

Note: The U.S. Census Bureau considers Hispanic an ethnicity, not a race; thus, there is no separate racial classification for Hispanic. According to the Census Bureau, people identifying themselves as Hispanic may be of any race. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates and Cochise College Center for Economic Research.

**SIERRA VISTA RACIAL COMPOSITION,  
2006-2008**

Note: Discrepancies are due to rounding. The U.S. Census Bureau considers Hispanic an ethnicity, not a race; thus, there is no separate racial classification for Hispanic. According to the Census Bureau, people identifying themselves as Hispanic may be of any race. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates and Cochise College Center for Economic Research.

**SIERRA VISTA AGE GROUPS,  
2006-2008**

Note: Discrepancies are due to rounding. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates and Cochise College Center for Economic Research.

(ACS). Those classifying themselves as Black or African American declined from 10.9 to 9.2 percent of the population and those classifying themselves as Native Hawaiian or other Pacific Islander dropped from 0.5 to 0.3 percent of the population. The proportion of the city's population classifying themselves as American Indian or Alaska Native remained unchanged from 2000 to 2006-2008, stabilizing at 0.8 percent.

(Note: The U.S. Census Bureau considers Hispanic an ethnicity, not a race; thus, there is no separate racial classification for Hispanics. According to the Census Bureau, people identifying themselves as Hispanic may be of any race. Shifts in racial composition do not necessarily represent changing demographics alone, but may include differences in how residents choose to classify themselves.)

## Age Groups

According to data from the U.S. Census Bureau, the median age of the city's population in 2006-2008 was 35.4 years, considerably below the median age of 39.6 years for all of Cochise County and slightly above the statewide median age of 35 years. The city's median age of 35.4 years in 2006-2008 was up from 32 years in 2000. In 2006-2008, 76.1 percent of Sierra Vista's population was aged 18 years and older (up from 74.2 percent in 2000); 20.1 percent was aged 62 years or older (up from 14.6 percent in 2000); and 16.4 percent was aged 65 years or older (up from 12.1 percent in 2000).

The fastest-growing age groups in Sierra Vista between 2000 and 2006-2008 were all in the 55 years or older categories. The fastest-growing age group was 85 years and older, which grew from 0.9 to 2.2 percent of the population. Second was the 75 to 84 years age group, which grew from 4.1 to 6.3 percent, followed by 60 to 64, which grew from 4.2 to 5.7 percent, and 55 to 59, which increased from 4.7 to 6 percent. The 65 to 74 years group also grew considerably, from 7.1 to 8.0 percent of the population.

## POPULATION ESTIMATES

	SIERRA VISTA		COCHISE COUNTY		ARIZONA	
	POPULATION	GROWTH	POPULATION	GROWTH	POPULATION	GROWTH
1990	32,983	—	97,624	—	3,665,228	—
2000	37,775	*14.5%	117,755	*20.6%	5,130,632	*40.0%
2001	38,740	2.6%	120,845	2.6%	5,319,785	3.7%
2002	40,415	4.3%	123,945	2.6%	5,470,720	2.8%
2003	40,410	0.0%	125,430	1.2%	5,642,725	3.1%
2004	42,725	5.7%	129,600	3.3%	5,845,250	3.6%
2005	43,690	2.3%	131,790	1.7%	6,077,740	4.0%
2006	44,870	2.7%	135,150	2.5%	6,305,210	3.7%
2007	44,736	-0.3%	137,200	1.5%	6,500,194	3.1%
2008	45,908	2.6%	139,434	1.6%	6,629,455	2.0%
2009	46,597	1.5%	140,263	0.6%	6,683,129	0.8%

\*Total growth over the period 1990-2000. Source: Figures for 1990 and 2000 obtained from the U.S. Census Bureau. Figures for 2001-2009 are estimates provided by the Arizona Department of Commerce.



### SIERRA VISTA CHANGES IN AGE GROUP DISTRIBUTION

	2000	2006-2008
UNDER 5	7.7%	8.3%
5 TO 9	7.1%	7.0%
10 TO 14	6.9%	4.3%
15 TO 19	8.2%	7.8%
20 TO 24	9.0%	8.7%
25 TO 34	15.4%	13.5%
35 TO 44	13.8%	11.1%
45 TO 54	11.0%	11.2%
55 TO 59	4.7%	6.0%
60 TO 64	4.2%	5.7%
65 TO 74	7.1%	8.0%
75 TO 84	4.1%	6.3%
85 AND OVER	0.9%	2.2%

Source: U.S. Census Bureau, Census 2000 and 2006-2008 American Community Survey 3-Year Estimates and Cochise College Center for Economic Research.

Contributors to growth in the upper age groups include the area's increasing popularity as a retirement destination, longer life spans, and the aging Baby Boomer generation.

Of the age groups from birth to 44 years old, all declined as a share of the overall population between 2000 and 2006-2008 except for the under 5 years group, which increased from 7.7 to 8.3 percent. This may be indicative of a baby boom associated with the return of soldiers to Fort Huachuca from war deployments in Iraq and Afghanistan, but may also be due in part to an increase in the number of soldiers at the fort, who tend to be younger and thus more likely to have families with small children.

### Household Characteristics

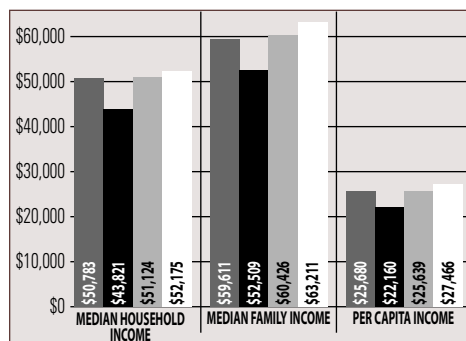
According to the Census Bureau, the average household size in Sierra Vista in 2006-2008 was 2.41 persons, down slightly from 2.48 in 2000. The declining household size in Sierra Vista may be due to the growing population of those aged 65 and older, who tend to have smaller household sizes.

Of total Sierra Vista households, 67.9 percent were classified as family households in 2006-2008, down from 70.4 percent in 2000. One-third of households had individuals under the age of 18 (down from 37.3 percent in 2000) and 28.1 percent had individuals aged 65 years and older (up from 22.1 percent in 2000). A total of 6.6 percent of Sierra Vista households were headed by single mothers of children under the age of 18 in 2006-2008, compared to 6.4 percent countywide and 7.1 percent statewide.

Of Sierra Vista's population aged 15 years and older, 56.1 percent were married (excluding those who were currently separated), 2.4 percent were separated, 10.1 percent were divorced, 2.9 percent were widowed, and 28.4 percent had never been married as of the 2006-2008 ACS.

As of 2006-2008, approximately 69.1 percent of Sierra Vista's population aged 1 year and older had resided in the same house for at least 1 year. Approximately 17.2 percent of Sierra Vista's population aged 1 year and older had relocated to the city within the previous year from outside Cochise County. The high relocation rate, which is approximately three times the national average, is attributable to military personnel transferring to and from Fort Huachuca.

### INCOME COMPARISONS, 2006-2008



Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates and Cochise College Center for Economic Research.

### Income

The median household income in Sierra Vista in 2006-2008 was \$50,783, considerably higher than the countywide median of \$43,821, but below the Arizona statewide level of \$51,124. Nationwide, the median household income was higher than the city, county, and state levels at \$52,175. The median family income for Sierra Vista in 2006-2008 was \$59,611, compared to \$52,509 for the county, \$60,426 statewide, and \$63,211 nationally. The Sierra Vista per capita income in 2006-2008 was \$25,680, compared to \$22,160 for the county, \$25,639 at the state level, and \$27,466 nationally. Sierra Vista's median household and family incomes were below the state level; however, its per capita income was slightly above the state level, reflective of the city's relatively smaller household and family sizes.

### Military Veterans

In 2006-2008, 31.4 percent of Sierra Vista's population aged 18 years and older were civilian veterans of the military. This was up from only 24.7 percent in 1990. Much of the increase in the number of veterans has resulted from the expansion in the number of Department of the Army civilian positions at Fort Huachuca over the years, as well as the demand for defense contracting personnel, many of whom are former members of the military. Also, the increasing number of retirees to the area has expanded the number of civilian veterans, since many of these retirees once served in the armed forces, though perhaps not in connection with Fort Huachuca.



General  
Dynamics in  
Sierra Vista

## Employment

### Arizona Department of Economic Security

#### EMPLOYMENT ADMINISTRATION (EA)

The Arizona Department of Economic Security's (DES's) EA, with an office in Sierra Vista, offers employment and training services to employers and individuals seeking new jobs, better jobs, or first jobs. The EA works with covered employers to assure payment of appropriate unemployment insurance taxes; ensures unemployed individuals receive the appropriate level of benefits; helps job seekers find employment; and offers customized services to employers.

#### FOREIGN LABOR CERTIFICATION PROGRAM

This program seeks to assure that foreign workers allowed into the United States to work on a permanent or temporary basis do not adversely affect job opportunities, wages, and working conditions for American workers. The Foreign Labor Certification Unit can determine the prevailing wage rate for employers based on the job description on the Prevailing Wage Request Form. This service is available free of charge.

#### DISABLED VETERANS OUTREACH PROGRAM (DVOP)

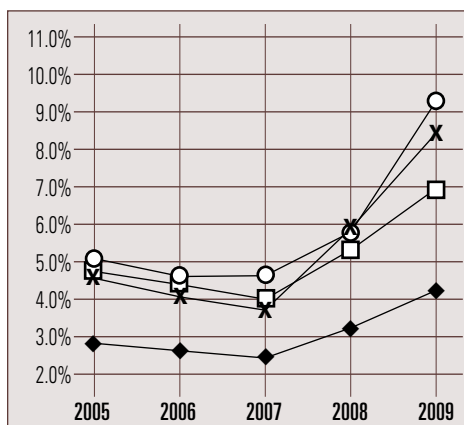
This program collects information on job and training opportunities for veterans, with a special emphasis on service-connected disabilities. DVOP specialists provide direct services that help veterans be competitive in the labor market. This includes providing outreach and assistance for disabled and other veterans by promoting community and employer support, including apprenticeships and on-the-job training.

### UNEMPLOYMENT RATE

	SIERRA VISTA	COCHISE COUNTY	ARIZONA	UNITED STATES
2005	2.8%	4.8%	4.6%	5.1%
2006	2.6%	4.4%	4.1%	4.6%
2007	2.4%	4.0%	3.8%	4.6%
2008	3.2%	5.3%	5.5%	5.8%
2009	4.2%	6.9%	8.5%	9.3%

Source: Arizona Department of Commerce and Cochise College Center for Economic Research.

### UNEMPLOYMENT RATE



◆ Sierra Vista  
 □ Cochise County  
 × Arizona  
 ○ United States

Source: Arizona Department of Commerce and the Cochise College Center for Economic Research.

### SIERRA VISTA CIVILIAN LABOR FORCE, EMPLOYMENT, JOB GAINS, AND JOB GROWTH RATE ESTIMATES

	CIVILIAN LABOR FORCE	EMPLOYMENT	UNEMPLOYMENT	JOB GAINS	JOB GROWTH RATE
2005	17,511	17,013	498	311	1.9%
2006	17,967	17,500	467	487	2.9%
2007	18,157	17,720	437	220	1.3%
2008	19,046	18,442	604	722	4.1%
2009	19,450	18,641	809	199	1.1%

Source: Arizona Department of Commerce and the Cochise College Center for Economic Research.

### EMPLOYMENT SERVICE (ES)

DES's ES provides a variety of employment related services to job seekers and employers. The program helps employers find qualified people who want to work. The EA staff helps persons seeking employment by providing career guidance when appropriate, employment skills workshops, and referrals to other training. Services are delivered through facilitated self-help programs designed to help applicants improve their individual skill sets. A primary responsibility of ES is to meet workforce development needs by finding qualified people who want to work. ES services include job search assistance, job referral, and placement assistance for workers who received notice of a permanent or impending layoff.

### FEDERAL BONDING PROGRAM (FBP)

FBP is an employer job-hire incentive that guarantees the job honesty of at-risk job seekers. It helps to secure Federal Fidelity Bond insurance, issued free-of-charge to employers. This delivery of bonding services is a unique job placement tool that helps ex-offenders and other job applicants who are at risk or may be hard to place (e.g., recovering substance abusers, welfare recipients, applicants with poor credit histories, etc.).

### SUPPLEMENTAL NUTRITION ASSISTANCE EMPLOYMENT AND TRAINING PROGRAM

This is a mandatory employment and training program for adults in households receiving Nutrition Assistance. It is intended to prevent long-term reliance on a food stamp subsidy by offering an opportunity to become economically independent through adequate employment.

### ACTIVITIES AND SERVICES FOR JOB SEEKERS

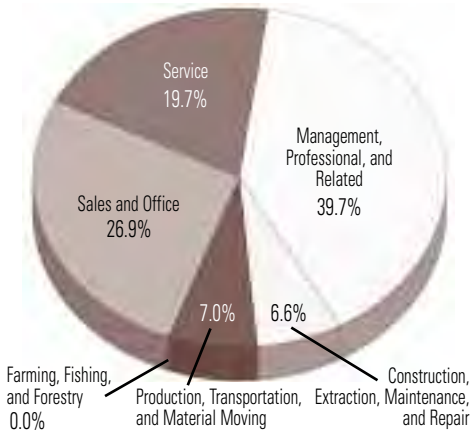
The ES referral and placement process is completed through a Web-based system known as the Virtual One Stop at [www.arizonavirtualonestop.com](http://www.arizonavirtualonestop.com). It provides interview applicants with job search; referral and placement assistance; counseling for applicants who need to make a job choice, change, or adjustment; information related to jobs that are posted, and the qualifications/physical demands; referrals to job openings; and re-employment services for individuals filing for or receiving unemployment insurance benefits.

### SERVICES FOR EMPLOYERS

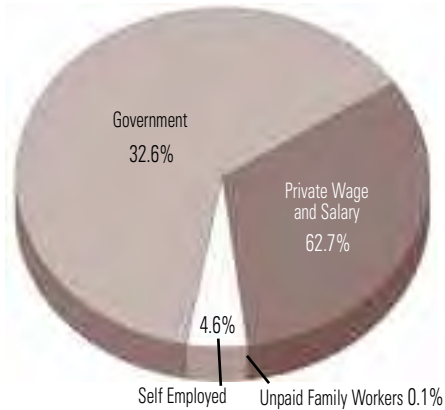
The ES staff provides special services to employers with a large volume of vacancies or unusual needs. Employers can list job openings by contacting any ES office. Employment specialists screen and refer applicants for consideration based on selected job requirements. Employers make the final selection. Employment specialists also can write effective job orders and descriptions, provide assistance with mass recruitments, and conduct on-site visits.

### ELIGIBILITY, FEES, AND MORE INFORMATION

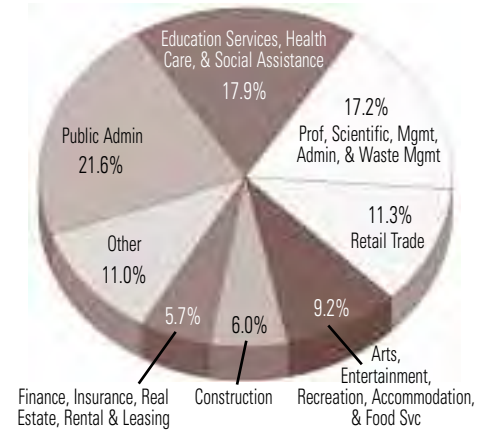
Job seekers who are legally authorized to work in the United States are eligible for ES assistance, whether they are unemployed or currently hold a job. Veterans receive priority services. Disabled veterans are given preference over other veterans. Any employer may list a job through ES as long as it is a real and legal job offer and the employer is an equal opportunity provider and employer. ES activities and services are free to both job seekers and employers. For Arizona DES contact information, see the Community Resources section of this publication.

**SIERRA VISTA OCCUPATIONS,  
2006-2008**

Note: Includes only the civilian employed population 16 years and over. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates; and Cochise College Center for Economic Research.

**SIERRA VISTA CLASSES OF WORKERS,  
2006-2008**

Note: Includes only the civilian employed population 16 years and over. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates; and Cochise College Center for Economic Research.

**INDUSTRIES IN SIERRA VISTA, 2006-2008  
(BY SHARE OF WORKFORCE)**

Note: Includes only those industries comprising at least 5 percent of the workforce; industries accounting for less than 5 percent of the workforce are grouped together in the category "other." Includes only the civilian employed population 16 years and over. Source: U.S. Census Bureau, 2006-2008 American Community Survey 3-Year Estimates; and Cochise College Center for Economic Research.

## Employment, Unemployment, Labor Force, and Job Growth

According to estimates by the Arizona Department of Commerce (ADOC), Sierra Vista's unemployment rate in 2009 was 4.2 percent. This was considerably below the countywide rate of 6.9 percent and the statewide rate of 8.5 percent. Nationally, the unemployment rate in 2009 was 9.3 percent. Sierra Vista's unemployment rate in 2009 was up 1 percentage point from 3.2 percent in 2008.

ADOC estimates of unemployment rates for cities in Cochise County are based on a model that pegs city rates to the county rate based on data from Census 2000. The model does not pick up changes at the city level since 2000 that differ from county-level trends. CER focus group discussions throughout the county indicate a likely overestimation of unemployment in Benson and Douglas, which have seen job creation that considerably outpaced the county-level trend. As a result, the unemployment rate in Sierra Vista is likely higher than estimated by ADOC. This is confirmed through the U.S. Census Bureau's American Community Survey (ACS) data, which suggest Sierra Vista's average unemployment rate between 2006 and 2008 ranged from 4.6 to 9 percent, while the ADOC model estimated the rate at approximately 2.7 percent. The countywide rate ranged from 5.7 to 8.3 percent from 2006 to 2008, according to the ACS data, suggesting the unemployment rate in Sierra Vista from 2006 to 2008 was much closer to the county rate than during Census 2000. The upshot is that decreased unemployment in the smaller cities, such as Benson and Douglas, is likely attributed to Sierra Vista in the ADOC estimates due to modeling errors. As a result, Sierra Vista's true unemployment rate is likely 2 or more percentage points higher than estimated by ADOC.

Sierra Vista's month-to-month employment data reflect seasonal patterns evident in employment data for most localities. The trend in Sierra Vista has been for higher-than-average unemployment rates to prevail in January, February, June, July, and December, while lower-than-average rates prevail in March, April, May, August, September, October, and November.

According to ADOC estimates, Sierra Vista's civilian labor force in 2009 consisted of 19,450 potential workers, of whom 18,641 were employed. The civilian labor force consists of those persons aged 16 years and older residing in the city who either are employed or are actively seeking work, and excludes active duty military personnel. Although Sierra Vista's labor force was 19,450 in 2009, the city draws heavily from the labor forces of surrounding communities, including Bisbee, Huachuca City, Tombstone,

**SIERRA VISTA MONTHLY UNEMPLOYMENT RATE**

		UNADJUSTED RATE	SEASONALLY ADJUSTED RATE
2008	January	2.9%	2.5%
	February	2.8%	2.6%
	March	2.8%	2.8%
	April	2.6%	2.8%
	May	2.8%	3.1%
	June	3.2%	3.2%
	July	3.4%	3.2%
	August	3.4%	3.5%
	September	3.4%	3.6%
	October	3.4%	3.6%
	November	3.4%	3.6%
	December	3.7%	3.7%
2009	January	3.8%	3.3%
	February	4.0%	3.8%
	March	4.0%	4.1%
	April	3.7%	3.9%
	May	3.8%	4.2%
	June	4.4%	4.3%
	July	4.6%	4.4%
	August	4.4%	4.4%
	September	4.5%	4.6%
	October	4.4%	4.5%
	November	4.2%	4.3%
	December	4.3%	4.2%

Source: Arizona Department of Commerce and Cochise College Center for Economic Research.

Whetstone, Hereford, and Palominas. Combined, these areas add approximately 15,000 potential workers from which Sierra Vista can draw. Countywide, the 2009 civilian labor force, according to ADOC estimates, included 62,200 actual or potential workers, of whom 57,925 were employed.

Although Sierra Vista saw job growth of 4.1 percent in 2008 and 1.1 percent in 2009, this job growth did not keep pace with growth in the labor force, resulting in a higher number of unemployed people in the city. From the beginning of the national recession in 2007 through 2009, the number of unemployed people in Sierra Vista increased from 437 to 809. Countywide, the number of unemployed people climbed from 2,300 to 4,300, according to ADOC estimates.

## Occupations and Classes of Workers

From 2006 to 2008, according to the U.S. Census Bureau, 39.7 percent of workers in Sierra Vista were employed in management, professional, and related occupations; 26.9 percent were employed in sales and office occupations; and 19.7 percent were employed in service occupations. Production, transportation, and material moving occupations employed 7 percent of the city's workers, while

construction, extraction, maintenance, and repair operations employed 6.6 percent.

Approximately 62.7 percent of Sierra Vista workers were private wage and salary workers from 2006 to 2008, while 32.6 percent were government workers. Self-employed workers in unincorporated businesses accounted for 4.6 percent, while unpaid family workers accounted for 0.1 percent of Sierra Vista workers from 2006 to 2008, according to the Census Bureau.

### SIERRA VISTA BUSINESS ESTABLISHMENTS, EMPLOYEES, AND PAYROLL

	2003	2004	2005	2006	2007
No. of Business Establishments	987	995	1,042	1,095	1,136
Number of Employees	13,401	14,136	14,823	15,562	15,989
Annual Payroll	\$347,567,000	\$370,249,000	\$385,681,000	\$441,190,000	\$508,585,000
Annual Payroll Per Employee	\$25,936	\$26,192	\$26,019	\$28,350	\$31,808
Annual Payroll Per Employee Growth	4.5%	1.0%	-0.7%	9.0%	12.2%

Note: Includes ZIP codes 85635, 85636, and 85650. Does not include government sector. Source: U.S. Census Bureau and Cochise College Center for Economic Research.

### SIERRA VISTA BUSINESS ESTABLISHMENTS BY EMPLOYMENT-SIZE CLASS, 2007

Number of establishments by employment-size class

INDUSTRY	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999
Accommodation & Food Services	33	12	19	31	11	2	0	0
Admin, Support, Waste Mgmt, & Remediation Services	43	13	8	3	3	0	1	0
Arts, Entertainment, & Recreation	6	2	2	3	0	0	0	0
Construction	46	24	20	12	5	0	0	0
Educational Services	7	5	2	3	1	0	0	0
Finance & Insurance	38	12	9	3	0	0	0	0
Health Care and Social Assistance	60	57	29	14	4	3	0	1
Information	10	6	1	3	1	0	0	0
Management of Companies & Enterprises	0	0	0	3	0	0	0	0
Manufacturing	8	3	2	4	0	0	0	0
Mining	0	0	1	0	0	0	0	0
Other Services (Except Public Administration)	62	23	12	7	0	0	0	0
Professional, Scientific, and Technical Services	68	26	12	14	2	5	2	0
Real Estate & Rental & Leasing	48	14	4	3	0	0	0	0
Retail Trade	60	69	25	16	7	6	2	0
Transportation & Warehousing	13	5	3	3	1	0	0	0
Utilities	6	1	0	2	1	0	0	0
Wholesale Trade	15	3	5	2	0	0	0	0
TOTAL	523	275	154	126	36	16	5	1

Note: Includes ZIP codes 85635, 85636, and 85650. Source: U.S. Census Bureau and the Cochise College Center for Economic Research.

## Industries

From 2006 to 2008, the industry grouping employing the largest number of Sierra Vista workers was public administration, which employed 21.6 percent of workers. This was followed by educational services, and health care and social assistance (17.9 percent); professional, scientific, management, administrative, and waste management services (17.2 percent); retail trade (11.3 percent); arts, entertainment, recreation, accommodation, and food services (9.2 percent); construction (6 percent); and finance and insurance, real estate, and rental and leasing (5.7 percent). The industry groupings of agriculture, forestry, fishing and hunting, and mining; manufacturing; wholesale trade; transportation and warehousing, and utilities; and information each employed fewer than 5 percent of Sierra Vista workers from 2006 to 2008, according to the Census Bureau.



## Major Employers

In 2009, Fort Huachuca remained Cochise County's top employer, according to the Cochise College Center for Economic Research's (CER's) annual Top 75 Employer Survey. Fort Huachuca has been the top employer in Cochise County every year since the CER began conducting the survey in 1999. According to *Arizona Daily Star's* annual "Star 200" employer survey, the fort was the seventh largest employer in all of Southern Arizona in 2009.

Fort Huachuca employed 10,146 fulltime equivalent (FTE) employees in 2009, which includes active duty military personnel and Department of the Army civilian employees. An FTE employee is equal to one fulltime or two part-time employees. The fort also has a large indirect employment impact on Cochise County. According to a 2008 study conducted by The Maguire Company in collaboration with ESI, Fort Huachuca generates and supports 26,921 FTE jobs in Cochise County, which includes the fort's direct employees, as well as those employed due to government contracts and spending by the fort and its employees. Nearly 83 percent of the indirect and induced employment generated by Fort Huachuca occurs in the county's retail trade and services industries, according to the study. For more on this, see the Fort Huachuca section of this publication.

The second largest employer in Sierra Vista in 2009 was the Sierra Vista School District, which employed 825 FTE employees. Northrop Grumman held the third-ranked position with 780 FTE employees. The Sierra Vista Regional Health Center, which employed 633 FTE employees, was ranked fourth. Aegis Communications was ranked fifth, with 504 FTE employees. The list of top employers includes only those businesses and organizations that responded to the CER's survey. In some cases, corporate policies prohibit certain businesses from releasing information regarding the number of workers they employ.

Most private-sector employers in Sierra Vista are small businesses. According to the U.S. Census Bureau, 70 percent of business establishments in Sierra Vista employed fewer than 10 workers each in 2007 (the most recent data available). Approximately 46 percent of all businesses in the city employed fewer than 5 workers each.

Between 2003 and 2007, the number of business establishments in Sierra Vista increased from 987 to 1,136, according to the U.S. Census Bureau (note: This includes private sector firms only). The number of private sector employees grew from 13,401 to 15,989, a 19.3 percent increase. From 2003 through 2007, the total annual payroll of businesses located in Sierra Vista increased from \$347.6 to \$508.6 million. On a per-employee basis, private-sector payrolls in Sierra Vista grew by 22.6 percent between 2003 and 2007, from \$25,936 to \$31,808. Inflation during that period was 12.7 percent, suggesting a real increase of nearly 10 percent in the purchasing power of private sector payrolls.

## Wages

In 2008, the average wage per hour in Sierra Vista was approximately \$19.11, considerably higher than the countywide average of \$18.05 and the statewide average of \$18.88. The national average hourly wage in 2008 was \$20.32. The average annual wage in Sierra Vista in 2008 was \$39,748, compared to \$37,543 for the county, \$39,280 for the state, and \$42,270 nationwide. The average wage in Cochise County in 2008 was the fourth highest of Arizona's 15 counties, behind Greenlee, Maricopa, and Pima counties. Wages in Cochise County increased 3.6 percent in 2008, failing to keep pace with inflation, which was 3.8 percent.

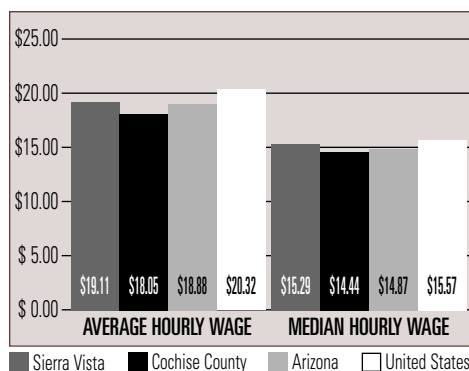
In recent years, the gap has narrowed considerably between wages in Cochise County and the statewide average. In 2004, Cochise County wages were 8.9 percent below the statewide average. This narrowed to 4.3 percent in 2008. From 2000 to 2008, Cochise County wages increased by 32.9 percent, compared to 25 percent inflation during the same period. This reflects real wage growth (an

## SIERRA VISTA'S TOP 25 EMPLOYERS, 2009

RANK	EMPLOYER	NUMBER OF FULLTIME EQUIVALENT (FTE)
		EMPLOYEES*
1	Fort Huachuca	10,146
2	Sierra Vista Unified School District #68	825
3	Northrop Grumman Corporation	780
4	Sierra Vista Regional Health Center	633
5	Aegis Communications Group, Inc.	504
6	Newtec, LLC	491
7	City of Sierra Vista	478
8	Science Applications International Corp. (SAIC)	300
9	Wal-Mart	295
10	ManTech Telecommunications and Information Systems Corp.	240
11	L3 Communications (C2S2)	205
12	Cochise College	189
13	Cochise County	182
14	Arizona Family Care Associates, Inc.	160
15	Life Care Center of Sierra Vista	152
16	ISIS	150
17	Fort Huachuca Accommodation Schools	138
18	Lawley Automotive Group	136
19	All Star Technical Services	135
20	McDonald's	110
21	Safeway	103
22	Lowe's	92
22	Hacienda Rehab and Care Center	92
24	Target	91
25	United States Postal Service	76

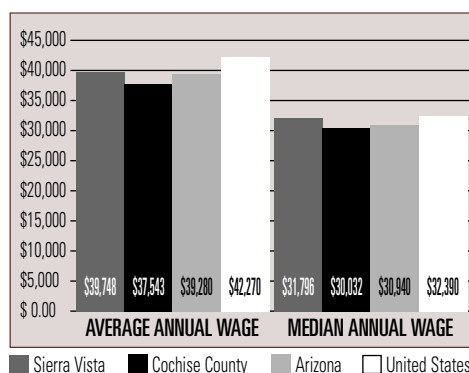
\*A fulltime equivalent (FTE) employee equals one fulltime employee or two part-time employees. For employers with multiple site locations, the number of FTE employees reflects only those employees reporting to work in Sierra Vista. Note: This list includes only those employers who responded to the CER's annual top employer survey. Source: Cochise College Center for Economic Research.

### HOURLY WAGE COMPARISONS, 2008



Source: U.S. figures are reported by the U.S. Department of Labor. State and county figures are reported by the Arizona Department of Commerce. City figures are estimated by the Cochise College Center for Economic Research using a census ratio model.

### ANNUAL WAGE COMPARISONS, 2008



Source: U.S. figures are reported by the U.S. Department of Labor. State and county figures are reported by the Arizona Department of Commerce. City figures are estimated by the Cochise College Center for Economic Research using a census ratio model.

increase in the purchasing power of wages) of 7.9 percent.

(Note: National wages are estimated by the U.S. Department of Labor, state and county figures are estimated by ADOC, and city figures are estimated by the CER.)

### Cochise County Employment

In 2009, Cochise County lost 1,150 nonfarm jobs for job growth of -3.0 percent. The only industries to see positive job growth in 2009 were professional and business services, leisure and hospitality, and the federal government. Professional and business services gained 250 jobs, for annual job growth of 4.4 percent. Leisure and hospitality gained 150 jobs, for job growth of 3.7 percent. Federal government gained 250 jobs, for job growth of 5.1 percent.

All other industries in Cochise County lost jobs in 2009. State and local government lost 150 jobs, for annual job growth of -2.0 percent. Within the private sector, construction lost 300 jobs, for job growth of -14.8 percent; manufacturing lost 125 jobs (-16.7 percent); trade, transportation, and utilities lost 575 jobs (-8.6 percent); information lost 100 jobs (-27.8 percent); financial activities lost 250 jobs (-5.4 percent); and other services lost 125 jobs (-13.5 percent).

The monthly employment data toward the end of 2009 showed a considerable slowing of the pace of job losses. Compared to December 2008, the number of nonfarm jobs countywide in December 2009 was down by 400, for a 12-month job growth rate of -1.1

percent, considerably below the annual rate of job losses for the year.

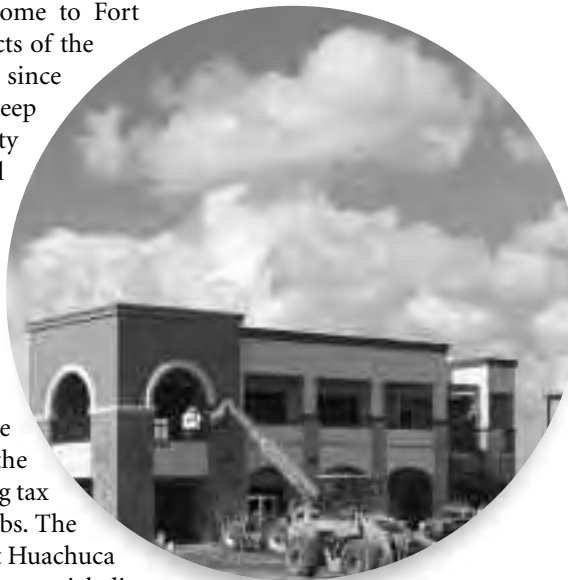
From December 2008 through December 2009, the county's goods producing subsector saw a net loss of 50 jobs for a 12-month job growth rate of -2.1 percent. The county's construction industry gained 100 jobs in the 12 months ending in December 2009, for job growth of 5.8 percent. Gains in construction were offset by the loss of 150 manufacturing jobs over the same period for job growth of -23.1 percent.

In the 12 months ending in December 2009, Cochise County's private service-providing subsector lost 250 jobs, for 12-month job growth of -1.1 percent. Trade, transportation, and utilities lost 325 jobs, for job growth of -5 percent. Other services lost 175 jobs, for job growth of -20 percent. Information lost 75 jobs, for job growth of -15.8 percent. Financial activities lost 25 jobs, for job growth of -3.7 percent. These job losses were partially offset by a gain of 25 educational and health services jobs, for job growth of 0.6 percent, and 325 leisure and hospitality jobs for job growth of 8.2 percent. Professional and business service jobs in December 2009 were at the same level as in December 2008.

In the 12 months ending in December 2009, government jobs declined by 100, for a 12-month job growth rate of -0.8 percent. This reflects 175 new federal government jobs, for a 12-month job growth rate of 3.4 percent, offset by the loss of 275 state and local government jobs, for job growth of -3.6 percent.

## Outlook

Based on trends toward the end of 2009, it appears that job losses at the county level will continue through the first quarter of 2010 and that the second quarter of the year will see an increase in the number of jobs. Sierra Vista, because it is home to Fort Huachuca, will continue to be spared from the most damaging effects of the recession. Although the city has seen recessionary conditions since November 2007, the declines in economic activity have not been as steep as in other areas of the state. New residential construction in the city rebounded in 2008 and 2009, and is likely now on a path of normal growth after weeding out the excesses of speculative building and investment, and subprime mortgages. This, along with continued strength in commercial construction, should help curtail job losses in construction and related industries. The construction of the new Wal-Mart Supercenter will help the construction industry overall, and its opening scheduled for late 2010 will help the city reduce business leakage to other areas and should provide a boon to retail sales. While job gains in federal government have helped cushion the county against the considerable losses in the private sector, the worsening budget situation at the state level, combined with declining tax revenues locally, continues to threaten state and local government jobs. The scheduled relocation of a 500-person army signal battalion from Fort Huachuca to Fort Bliss, Texas, threatens the employment situation, with a potential direct, indirect, and induced loss of 1,400 jobs countywide. These losses should, however, be partially offset by a continued increase in the number of military personnel trained at the fort. From 2008 to 2009, the number of fulltime equivalent employees at the fort increased by 1,161. Discussions with post officials suggest there will continue to be an increase in the number of trainees and other personnel.



## A NOTE ON EMPLOYMENT DATA

Employment data are widely regarded as one of the most important economic indicators; however, they are subject to sizable revisions. For the most up-to-date employment data for the local economy, visit the CER's website at [www.cochise.edu/cer](http://www.cochise.edu/cer).

### COCHISE COUNTY NON-FARM PAYROLL EMPLOYMENT

	2009	2008	CHANGE	% CHANGE
Total Non-farm	37,025	38,175	-1,150	-3.0%
Total Private	24,475	25,725	-1,250	-4.9%
Goods Producing	2,350	2,750	-400	-14.5%
Construction*	1,725	2,025	-300	-14.8%
Manufacturing	625	750	-125	-16.7%
Service-Providing	34,700	35,425	-725	-2.0%
Private Service-Providing	22,125	22,975	-850	-3.7%
Trade, Transportation, and Utilities	6,100	6,675	-575	-8.6%
Information	425	525	-100	-19.0%
Financial Activities	650	900	-250	-27.8%
Professional and Business Services	5,975	5,725	250	4.4%
Educational and Health Services	3,950	4,175	-225	-5.4%
Leisure and Hospitality	4,225	4,075	150	3.7%
Other Services	800	925	-125	-13.5%
Government	12,550	12,450	100	0.8%
Federal Government	5,175	4,925	250	5.1%
State and Local Government	7,375	7,525	-150	-2.0%

\*Includes mining. Note: Numbers are rounded to the nearest 25. Discrepancies are due to rounding.  
Source: Arizona Department of Commerce and the Cochise College Center for Economic Research.

The largest sales tax revenue generator for the city in 2009 was retail trade



## Retail trade and commerce

### Population Served by Sierra Vista's Retail Market

Although the population of the incorporated limits of Sierra Vista was 46,597 in 2009, the city's retail market serves a population more than twice that size. Sierra Vista accounts for just under one-third of the population of Cochise County, yet it accounts for nearly two-thirds of its retail sales, making it the economic hub of the county. According to the Arizona Department of Transportation, in 2008 more than 29,000 vehicles per day traveled along State Route 90 between Fry Boulevard and East Foothills Drive, through the heart of Sierra Vista's commercial district.

In 2008, the Cochise College Center for Economic Research (CER) developed a model to estimate the population served by Sierra Vista's retail market. The model considers Sierra Vista's share of total retail sales in Cochise County, and applies that proportion to the estimated total population served by the Cochise County retail market. While Cochise County experiences some in-shopping from residents of neighboring Arizona counties and from New Mexico on its eastern border, it also sees out-shopping by some of its residents to nearby markets, most predominantly Tucson. The CER's model assumes in- and out-shopping involving other Arizona counties and New Mexico will offset each other.

Cochise County experiences a high rate of in-shopping from Mexico. This population is included in the CER's retail customer base population model. To estimate the size of the Mexican population that is served by the Cochise County retail market, the CER applied border crossing data from 2006 to data from a 2001 University of Arizona study that showed 70.6 percent of visitors at the Douglas port and 85 percent at the Naco port crossed the border for the primary purpose of shopping (for more on this study, see the Mexico section of this publication). To control for multiple visits, the CER model assumes that residents of Mexico who cross for the

primary purpose of shopping make three shopping visits per week to Cochise County.

Based on border crossing data from 2006, the CER estimates that, on average, 38,561 unduplicated residents of Mexico entered Cochise County three times each week for the primary purpose of shopping. This is roughly one-third of the population of the Sonoran cities of Agua Prieta and Naco, which lie just south of the ports of entry in Douglas and Naco, respectively. It is assumed that all family members represented by a shopper accompanied the shopper on the trip; thus, no additions are made for family members who consume retail products purchased in Cochise County, but who are not part of the shopping party. Also, no additions are made for residents of Mexico who visit for primary reasons other than shopping, but who nonetheless engage in shopping incidental to the visit.

The estimate of 38,561 unduplicated Mexican shoppers was added to Cochise County's 2006 population of 135,150 for a total countywide market of 173,711. In 2006, retail sales in Sierra Vista accounted for 63.9 percent of total retail sales in Cochise County. Applying this figure to the estimated total population served by the Cochise County retail market, the CER estimates that, in 2006, Sierra Vista's retail market served a population of approximately 111,000. This number has likely increased since then due to normal population growth.

Research conducted by ESI Corporation in 2003, using a geographic model based on commuting times, estimated the population of the Sierra Vista trade area at 86,876 for the year 2000. Adjusting for population growth estimates for Cochise County, as published by the Arizona Department of Commerce, this number would be 99,709 for 2006. The ESI figures, however,

#### AVERAGE ANNUAL DAILY TRAFFIC COUNT, SIERRA VISTA AREA

LOCATION	2004	2005	2006	2007	2008
Ft Huachuca (N Gate) to Ft Huachuca (E Gate)	17,100	17,000	17,353	18,308	18,727
Fort Huachuca (East Gate) to 7th St	17,600	17,200	14,988	16,175	16,369
7th Street to Coronado Dr/San Xavier Rd	16,500	15,800	17,157	16,175	16,369
Coronado Dr/San Xavier Rd to Charleston Rd	15,300	14,200	17,683	17,718	17,930
Charleston Rd to SR 92/Fry Blvd	17,000	21,900	15,182	14,554	14,729
SR 92/Fry Blvd - SV to Giulio Cesare Ave	16,800	18,600	17,042	17,649	17,861
Giulio Cesare Ave to Moson Rd	8,200	8,800	8,392	8,642	8,746
Moson Rd to SR 80	4,300	3,600	3,475	4,014	3,602
SR 90/Fry Blvd - SV to East Foothills Dr	30,500	31,700	27,769	28,796	29,142
East Foothills Dr to Snyder Rd	34,300	28,100	26,565	25,123	25,425
Snyder Blvd to Avenida Cochise	30,400	27,200	24,749	26,240	26,555
Avenida Cochise to Buffalo Soldier Trail	26,300	23,200	20,658	21,422	21,679
Buffalo Soldier Tr to Glenn Ave/Kachina Tr	22,000	23,900	22,462	25,655	25,963
Glenn Ave to Ramsey Canyon/Ramsey Rd	16,000	20,500	19,896	20,632	20,880
Ramsey Canyon/Rd to Hereford Rd - Nicksville	12,900	12,000	11,793	11,298	10,541

Note: Figures from 2004 and 2005 are rounded to nearest hundred. Source: Arizona Department of Transportation.

#### SIERRA VISTA SALES TAX REVENUE BY INDUSTRY GROUP, 2009

INDUSTRY GROUP	SALES TAX REVENUE	SHARE OF TOTAL SALES TAX REVENUE
Retail Trade	\$8,813,864	51.4%
Restaurant & Bar	\$1,755,448	10.2%
Communications & Utilities	\$1,544,099	9.0%
Real Estate, Rental & Leasing	\$1,495,365	8.7%
Accommodation	\$1,326,956	7.7%
Construction	\$1,150,699	6.7%
Services	\$434,055	2.5%
Manufacturing	\$370,751	2.2%
Wholesale Trade	\$133,101	0.8%
Other	\$109,821	0.6%
Arts & Entertainment	\$10,336	0.1%
Finance & Insurance	\$9,687	0.1%
Transporting & Warehousing	\$8,449	0.0%
TOTAL	\$17,162,631	

Source: Arizona Department of Revenue and Cochise College Center for Economic Research.

#### SIERRA VISTA RETAIL SALES

YEAR	SALES	% CHANGE	INFLATION-ADJUSTED GROWTH
2004	\$443,083,563	8.9%	6.2%
2005	\$476,285,441	7.5%	4.1%
2006	\$501,049,475	5.2%	2.0%
2007	\$528,011,943	5.4%	2.6%
2008	\$513,395,543	-2.8%	-6.6%
2009*	\$446,609,086	-2.1%	-1.5%

\*January through November only; percent change and inflation-adjusted growth based on same period a year prior. Note: Data shown are estimates. Inflation-adjusted growth is calculated using the inflation rates as determined by the Consumer Price Index (CPI). Source: Arizona Department of Revenue and Cochise College Center for Economic Research.

#### SIERRA VISTA SALES TAX REVENUE COLLECTIONS, ANNUAL COMPARISON

INDUSTRY GROUP	2009	2008	GROWTH (\$)	GROWTH (%)
Accommodation	\$1,326,956	\$1,163,837	\$163,119	14.0%
Real Estate, Rental & Leasing	\$1,495,365	\$1,393,669	\$101,696	7.3%
Restaurant & Bar	\$1,755,448	\$1,710,170	\$45,278	2.6%
Services	\$434,055	\$426,486	\$7,569	1.8%
Arts & Entertainment	\$10,336	\$10,284	\$52	0.5%
Transporting & Warehousing	\$8,449	\$10,769	-\$2,320	-21.5%
Finance & Insurance	\$9,687	\$12,901	-\$3,214	-24.9%
Manufacturing	\$370,751	\$377,072	-\$6,321	-1.7%
Other	\$109,821	\$182,404	-\$72,583	-39.8%
Communications & Utilities	\$1,544,099	\$1,649,900	-\$105,801	-6.4%
Wholesale Trade	\$133,101	\$258,620	-\$125,519	-48.5%
Retail Trade	\$8,813,864	\$8,986,596	-\$172,732	-1.9%
Construction	\$1,150,699	\$1,433,868	-\$283,169	-19.7%
TOTAL	\$17,162,631	\$17,616,576	-\$453,945	-2.6%

Source: Arizona Department of Revenue and Cochise College Center for Economic Research.



### SIERRA VISTA RETAIL SALES PER CAPITA

YEAR	RETAIL SALES PER CAPITA	% CHANGE	INFLATION- ADJUSTED GROWTH
2004	\$10,371	3.0%	0.3%
2005	\$10,901	5.1%	1.7%
2006	\$11,167	2.4%	-0.8%
2007	\$11,803	5.7%	2.9%
2008	\$11,183	-5.3%	-9.1%

Note: Data shown are estimates. Inflation-adjusted growth is calculated using the inflation rates as determined by the Consumer Price Index (CPI). Based on population estimates provided by the Arizona Department of Commerce and sales tax collection data provided by the Arizona Department of Revenue.

### SIERRA VISTA RESTAURANT & BAR SALES

YEAR	SALES	% CHANGE	INFLATION- ADJUSTED GROWTH
2004	\$50,190,962	1.5%	-1.2%
2005	\$54,652,268	8.9%	5.5%
2006	\$61,359,154	12.3%	9.1%
2007	\$64,832,192	5.7%	2.9%
2008	\$66,034,769	1.9%	-2.0%
2009*	\$61,773,692	2.5%	3.1%

\*January through November only; percent change and inflation-adjusted growth based on same period a year prior. Note: Inflation-adjusted growth is calculated using the inflation rates as determined by the Consumer Price Index (CPI). Data shown are estimates. Source: Arizona Department of Revenue and Cochise College Center for Economic Research.

### SIERRA VISTA ACCOMMODATION SALES

YEAR	TOTAL REVENUE	% CHANGE	INFLATION- ADJUSTED GROWTH
2004	\$12,665,528	20.7%	18.0%
2005	\$15,026,091	18.6%	15.2%
2006	\$15,090,018	0.4%	-2.8%
2007	\$18,699,564	23.9%	21.1%
2008	\$23,046,036	23.2%	19.4%
2009*	\$21,008,727	5.4%	6.0%

\*January through November only; percent change and inflation-adjusted growth based on same period a year prior. Note: Inflation-adjusted growth is calculated using the inflation rates as determined by the Consumer Price Index (CPI). Data shown are estimates. Source: Arizona Department of Revenue and Cochise College Center for Economic Research.

### SIERRA VISTA SHARE OF TOTAL COUNTYWIDE SALES

CATEGORY	2006	2007	2008	2009*
Retail	63.9%	66.3%	66.2%	66.6%
Restaurant & Bar	51.1%	52.5%	51.4%	52.3%
Accommodation	42.6%	43.1%	50.7%	54.6%

\*January through November only. Source: Arizona Department of Revenue and Cochise College Center for Economic Research.

did not include shoppers from Mexico, which the CER model includes. Also, while the ESI model made additions for in-shopping from Santa Cruz and Pima counties, it did not make subtractions for out-shopping by Cochise County residents. The CER model assumes a countywide net effect of zero for the combined effects of in-shopping and out-shopping from other Arizona counties, as well as New Mexico.

### Taxable Sales

In 2009, the City of Sierra Vista collected \$17.2 million in sales tax revenue. This was down 2.6 percent from 2008. Considerable declines in construction, retail, wholesale trade, and communications and utilities related to recessionary conditions nationwide were partially offset by increases in accommodation (hotel, motel, and other temporary lodging stays of less than 30 days); real estate, rental and leasing; and restaurant and bar. The net effect was a decline of about \$454,000 in sales tax revenue. The largest sales tax revenue generator for the city in 2009 was retail trade, which accounted for 51.4 percent of the total. This was followed by restaurant and bar at a distant 10.2 percent and communications and utilities at 9 percent.

### Retail Sales

In the first 11 months of 2009, retail sales in Sierra Vista were down by 1.5 percent in real (inflation-adjusted) terms, compared to the same period of 2008. This followed a 6.6 percent annual decline in 2008. Although sales were down, the pace of decline slowed in the second half of 2009 and sales were up in November, when compared to November 2008. Sierra Vista's retail sales in the first 11 months of 2009 accounted for 66.6 percent of the countywide total, up from 65.6 percent in the same period of 2008. December sales, which were not available as of the date of this publication, typically increase Sierra Vista's share of the countywide retail market due to the high level of holiday shopping in the city.

Retail sales per capita in Sierra Vista in 2008 totaled \$11,183, down 5.3 percent from the year prior, for inflation-adjusted growth of -9.1 percent. Retail sales per capita is a useful measurement because it controls for the effects of population growth on sales and gives an indication of changes in individual spending, as well as the impact of spending by visitors to the city. Contributors to change in retail sales per capita may include a change in the population outside the city limits, a change in the number of shoppers from other areas (including Mexico), a change in consumer preferences (e.g., consumers choosing to shop in Sierra Vista rather than in other cities), a change in tourism patterns, or changes in spending by families, households, and individuals. At the time of this publication, complete sales data for 2009 were not yet available; however, indications are that real retail sales per capita declined between 3 and 4 percent in 2009.

According to the U.S. Census Bureau, in 2007 there were 185 establishments in Sierra Vista whose primary business was retail trade. This was down from 188 the year prior.

### Restaurant and Bar Sales

In the first 11 months of 2009, restaurant and bar receipts in Sierra Vista were up 3.1 percent from the same period of 2008, after adjusting for inflation. The increase followed a 2 percent decline in 2008. From January through November 2009, Sierra Vista's restaurant and bar sales accounted for 52.3 percent of the countywide total, up from 51.2 percent in the first 11 months of 2008.

## Accommodation Sales

From January through November 2009, accommodation receipts in Sierra Vista were up 6 percent from the same period of 2008, after adjusting for inflation. This followed exceptional performance that saw growth of 21.1 and 19.4 percent in 2007 and 2008, respectively. The strong performance of this industry has been driven by the recent opening of several new hotels in the city, which reduces business leakage to surrounding communities. From January through November 2009, Sierra Vista's accommodation sales accounted for 54.6 percent of the countywide total, up from 49 percent in the first 11 months of 2008. According to the Arizona Office of Tourism, lodging room supply in Cochise County was up 10.1 percent in 2008 and 2.3 percent in the first 11 months of 2009, due primarily to the opening of the new hotels in Sierra Vista. For more on the accommodation industry in Sierra Vista and Cochise County, see the Tourism section of this publication.



Sonoita wine

Photo: City of Sierra Vista

## Business Establishments and Licenses

According to the U.S. Census Bureau, as of 2007 there were 1,136 business establishments located in the Sierra Vista area (zip codes 85635, 85636, and 85650). The industries with the largest number of businesses were retail trade (185); health care and social assistance (168); professional, scientific, and technical services (129); accommodation and food services (108); construction (107); and other services (104).

From 2006 to 2007, the number of business establishments in the Sierra Vista area grew by 41, or 3.7 percent. Industries that grew the most in terms of the number of new establishments were professional, scientific, and technical services, which grew by 16 firms; accommodation and food services, which grew by 12 establishments; and healthcare and social assistance, which also grew by 12 establishments.

Between 2003 and 2007, the industry grouping to see the largest number of new firms in the Sierra Vista area was health care and social assistance, which added 34 new firms. This was followed closely by professional, scientific, and technical services, which added 33 firms. Accommodation and food services added 24 firms; administrative, support, waste management, and remediation services added 18 new firms; and construction added 17.

According to the City of Sierra Vista, the year-end total number of active business licenses in the city increased by 12.3 percent between 2008 and 2009, from 2,925 to 3,285. From 2005 to 2009, the number of active licenses increased by 78.1 percent, from 1,844 to 3,285. These figures are not directly comparable to Census Bureau business establishment figures discussed above since some establishments hold multiple business licenses and some are home-based or sole proprietorship businesses, which are excluded from the Census survey.

### SIERRA VISTA BUSINESS LICENSES

	2005	2006	2007	2008	2009
New Licenses	437	524	509	437	427
Cancelled/Non-renewed Licenses	257	134	139	116	67
Year-end Total Licenses	1,844	2,234	2,604	2,925	3,285

Source: City of Sierra Vista

### SIERRA VISTA BUSINESS ESTABLISHMENTS

INDUSTRY	2003	2004	2005	2006	2007
Accommodation & Food Services	84	84	96	96	108
Admin, Support, Waste Mgt, Remediation Services	53	53	55	71	71
Arts, Entertainment & Recreation	10	10	13	11	13
Construction	90	92	104	107	107
Educational Services	11	12	16	16	18
Finance & Insurance	59	61	64	63	62
Health Care and Social Assistance	134	145	155	156	168
Information	21	19	20	20	21
Management of Companies & Enterprises	3	3	2	2	3
Manufacturing	14	16	18	22	17
Mining	0	0	1	1	1
Other Services (Except Public Administration)	106	105	106	107	104
Professional, Scientific, and Technical Services	96	96	96	113	129
Real Estate & Rental & Leasing	63	63	63	67	69
Retail Trade	189	185	183	188	185
Transportation & Warehousing	18	17	17	18	25
Unclassified Establishments	6	7	3	4	0
Utilities	9	8	8	9	10
Wholesale Trade	21	19	22	24	25
TOTAL	987	995	1,042	1,095	1,136

Note: Data for zip codes 85635, 85636, and 85650. Source: U.S. Census Bureau and Cochise College Center for Economic Research.

### RETAIL OUT-SHOPPING BY SIERRA VISTA RESIDENTS, 2006

CATEGORY OF SALES	OUT-SHOPPING (%)
Computer hardware/software	49.6%
Furniture	45.1%
Hobby supplies	44.2%
Jewelry	40.8%
Home Furnishings	39.6%
Electronics	37.4%
Children's clothing	37.4%
Sporting goods	37.3%
Books	34.0%
Women's clothing	33.8%
Appliances	33.2%
Men's clothing	30.5%
Auto parts and accessories	29.5%
Music (CDs, tapes, etc.)	27.6%
Building materials	25.7%
Hardware	24.3%
Beer, wine, and liquor	23.1%
Garden supplies	22.7%
Video (DVDs, VHS tapes, etc.)	22.7%
Gasoline	18.2%
Health and personal care items	16.0%
Groceries	14.3%

Source: Cochise College Center for Economic Research.

### Sierra Vista Retail Out-Shopping Survey

In 2006, the CER conducted a survey of Sierra Vista residents to determine their level of retail out-shopping. Out-shopping refers to shopping done by Sierra Vista residents at businesses located outside the city. The survey included 400 Sierra Vista residents.

The category of computer hardware and software saw the greatest percentage of out-shopping in 2006. Residents reported conducting 49.6 percent of their shopping for computer hardware and software outside Sierra Vista. It is important to note that the survey was conducted prior to the opening of Best Buy, which has likely reduced out-shopping in this category. The next largest category of out-shopping was furniture, with reported out-shopping of 45.1 percent; hobby supplies, with 44.2 percent out-shopping; and jewelry, with 40.8 percent out-shopping. Out-shopping for all other categories of merchandise was reported at less than 40 percent.

The category of groceries saw the lowest level of out-shopping. Residents reported making 14.3 percent of their grocery purchases outside Sierra Vista. This was followed by health and personal care items at 16 percent and gasoline at 18.2 percent.

Overall, Sierra Vista residents reported conducting 23.8 percent of their retail shopping over the internet and 20 percent through catalogs. Of total survey respondents, over half offered narrative comments in the free response section of the survey. Of those offering narrative comments, 31.6 percent cited a lack of variety of stores and merchandise, 4.7 percent opined prices were too high, and 3.3 percent cited poor customer service.

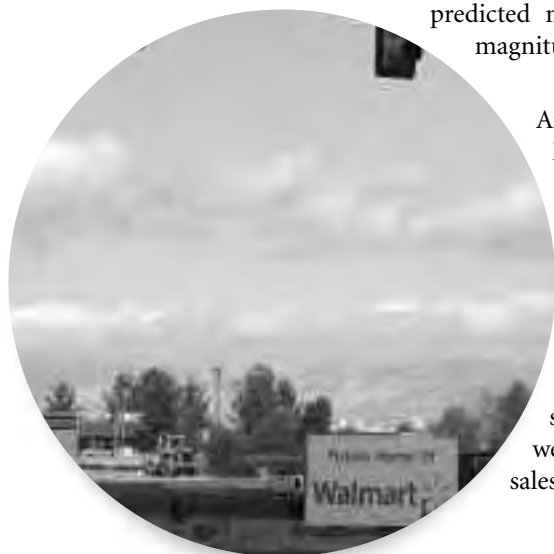
As noted earlier, hobby supplies saw one of the largest rates of out-shopping at 44.2 percent, the third highest of all categories. This was reinforced in the free response section of the survey where 7.9 percent of those leaving comments cited the lack of availability of arts, crafts, or hobby supplies or called for specific arts and crafts retail outlets. Over 80 percent of those surveyed reported purchasing hobby supplies.

### Outlook

Sierra Vista's retail sales are on track to rebound in 2010. Although overall sales declined in the first 11 months of 2009, the pace of declines slowed in the second half of the year and sales were up 5.9 percent in November, the beginning of the holiday shopping season. December sales, which were not available at the time of this publication, will likely push annual sales for 2009 to break even with those in 2008. Modest growth in 2010 is likely. In January, the National Retailers Federation predicted nationwide sales would increase 2.5 percent in 2010; growth of this magnitude is a reasonable prediction for Sierra Vista, as well.

Sierra Vista's restaurant and bar sales are also likely to see growth in 2010. After declining from January through April, sales grew each month from May through November 2009, with monthly sales up an average of 6.4 percent when compared to the same months a year prior. Growth in this range is likely to continue through 2010.

Accommodation sales are likely to see a slowing of growth from the highs seen from 2007 to 2009. A large factor is the higher base established by the opening of several hotels in the city in 2007 and 2008. Beginning in mid-2009, sales levels are now compared to that higher base; as a result, growth levels have slowed considerably. From January through June 2009, sales were up by 12.4 percent; however, from July through November sales were down by 1.1 percent. For 2010, a stabilization or slight decline in overall sales is likely.





Sierra Vista  
has seen  
extraordinary growth  
in commercial  
construction in  
recent years

## Housing, real estate, and commercial construction

### New Residential Construction

Sierra Vista saw a rebound in new residential construction in 2008 with an 11.8 percent increase in new home permits. Although permits were down by 1 percent in 2009, they remained well above the trough hit in 2007. The rebound followed three consecutive years of steep declines. New home permits fell by 16.3, 26.0, and 58.3 percent, respectively, in 2005, 2006, and 2007. At the bottom of the market, in 2007, permits were at their lowest level since 1995, and represented a decline of 74.2 percent from the peak in 2004. Indications are that new residential construction in Sierra Vista has returned to a path of normal growth, notwithstanding the overall slight decline in 2009, which was attributable to poor performance in the first half of the year. Data toward the end of the year show a considerable increase in new residential construction in Sierra Vista, with much of this due to lower home prices, record-low mortgage rates, and the homebuyer tax credit.

Cochise College Center for Economic Research (CER) focus group discussions in Sierra Vista indicate the new residential construction market is doing well in large part due to the steady influx of military, civilian, and contractor personnel associated with Fort Huachuca, which is located in the city. This is an especially vital portion of the market because active duty military personnel, and many of the fort's civilian and contractor personnel who are veterans, purchase their homes using Veterans Administration (VA) guaranteed loans, which have not suffered as badly from the frozen credit markets of recent years. In 2009, VA loans were one of the very few classes of loans for which 100 percent loan-to-value financing was still available.

Another way Fort Huachuca has helped the local residential construction market is through continued residential construction on the fort. Although the land on Fort Huachuca is part of the city limits and the fort's residents are included in the city's population numbers, construction on the



### NEW HOME PERMITS (SINGLE FAMILY RESIDENTIAL)

YEAR	COCHISE COUNTY		SIERRA VISTA	
	PERMITS	CHANGE	PERMITS	CHANGE
2002	653	—	376	—
2003	926	41.8%	595	58.2%
2004	1,046	13.0%	689	15.8%
2005	1,108	5.9%	577	-16.3%
2006	900	-18.8%	427	-26.0%
2007	472	-47.6%	178	-58.3%
2008	404	-14.4%	199	11.8%
2009	*296	*-17.1%	197	-1.0%

\*January-October only; comparison to same period the year prior.  
Source: Bright Future Business Consultants of Tucson; City of Sierra Vista; and Cochise College Center for Economic Research.

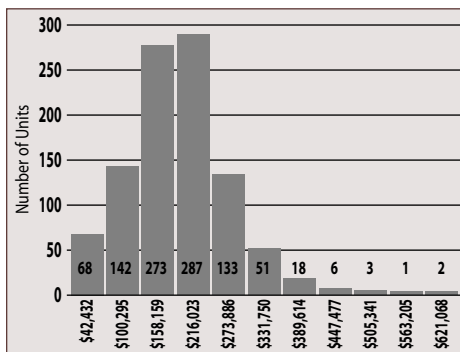
fort, which is federally owned land, is not subject to the city's building permit process. For that reason, new construction on the fort does not show up in the city's building permit numbers. In recent years, residential communities on the fort have been constructed by local builders Castle & Cooke Arizona and R. L. Workman Homes. Residential construction is projected to continue on Fort Huachuca through 2014, with work done by private-sector firms as part of the Army's wider housing privatization efforts under its Residential Communities Initiative.

In the short term, Fort Huachuca should provide a steady inflow of personnel helping to keep the new residential construction market on a path of normal growth, albeit at much lower levels than during the housing boom years. This is despite the projected loss of a 500-person signal battalion, scheduled to relocate from Fort Huachuca to Fort Bliss, Texas in 2011. While this represents a considerable decline in the fort's numbers, discussions with fort officials suggest the loss continues to be offset by increases in other areas, including the number of personnel receiving training at the fort. Although the loss of the signal battalion will bring the fort's numbers down by 500, the number of full-time equivalent employees at the fort increased by nearly 1,200 from 2008 to 2009 alone.

Another significant portion of the housing market, according to CER focus group discussions, has been U.S. Border Patrol agents assigned to stations in Naco, Douglas, and neighboring Santa Cruz County. Retirees have also made up a significant portion of the new home market over the past several years and this seems likely to continue. U.S. Census Bureau data for 2006-2008 indicate the city continues to draw retirees, evidenced by the strong growth in the city's upper age groups. The fastest-growing age groups in Sierra Vista between 2000 and 2008 were all in the 55 years or older category. (Note: Other contributors to growth in the upper age groups, beside in-migration, are longer life spans and the aging Baby Boomer generation.)

While new construction was on the rise in Sierra Vista, countywide new residential home construction was down in 2008 and 2009. There were 296 new home permits issued throughout Cochise County in the first 10 months of 2009, down 17.1 percent from the same period of 2008. This followed annual declines of 18.8, 47.6, and 14.4 percent in 2006, 2007, and 2008, respectively. The new home market decline in the Sierra Vista area began a year earlier than the countywide decline, which might help explain why Sierra Vista began to recover sooner. Moreover, the declines in 2006 and 2007 were considerably steeper in the Sierra Vista area than countywide, shortening the time duration to the bottom of the cycle. Although permits countywide were down overall from January through October 2009, when compared to the same period of 2008, permits in the third quarter of 2009 were 29.6 percent higher than in the third quarter of 2008 and were up in each month of the third quarter and into October. Strong performance from July through October may signal the beginning of the recovery of the countywide new home market.

### SIERRA VISTA AREA EXISTING HOME SALES, 2009



Note: Includes only those homes listed on Southeast Arizona Multiple Listing Service. Includes site-built homes, townhouses, and condominiums. The Sierra Vista Area includes Sierra Vista, Hereford, Huachuca City, Tombstone, and surrounding unincorporated areas. Prices shown are midpoint prices; each bin represents a price range of \$57,864 (+/- \$28,932 from midpoint price shown). Source: Southeast Arizona Multiple Listing Service and Cochise College Center for Economic Research.

### SIERRA VISTA AREA, DISTRIBUTION OF EXISTING HOME PRICES, 2009

MINIMUM PRICE	MAXIMUM PRICE	MIDPOINT PRICE	NUMBER OF HOMES	PERCENT OF TOTAL HOMES
\$13,500	\$71,364	\$42,432	68	6.9%
\$71,364	\$129,227	\$100,295	142	14.4%
\$129,227	\$187,091	\$158,159	273	27.7%
\$187,091	\$244,955	\$216,023	287	29.2%
\$244,955	\$302,818	\$273,886	133	13.5%
\$302,818	\$360,682	\$331,750	51	5.2%
\$360,682	\$418,545	\$389,614	18	1.8%
\$418,545	\$476,409	\$447,477	6	0.6%
\$476,409	\$534,273	\$505,341	3	0.3%
\$534,273	\$592,136	\$563,205	1	0.1%
\$592,136	\$650,000	\$621,068	2	0.2%

\*January through November only. Source: Arizona Department of Revenue and Cochise College Center for Economic Research.

### Existing Home Sales

Existing home sales in Cochise County hit the bottom of the market in 2008 and remained there into 2009. Sales of site-built homes, including townhouses and condominiums, fell 20.6, 10.7, and 18.3 percent in 2006, 2007, and 2008, respectively. The decline in 2009 was less than half a percent, representing a continued crawl along the market trough. In the Sierra Vista area, the existing home market hit bottom in 2008 and saw modest growth of 2.4 percent in 2009. As of February 1, 2010, countywide there was a 10-month supply of site-built homes, including townhouses and condominiums, for sale listed on the Southeastern Arizona Multiple Listing Service, and a 9-month supply in Sierra Vista, based on recent sales levels.

In 2009, the countywide median home price fell by 3.1 percent, and in the Sierra Vista area the decline was nearly twice that at 6 percent. From 2007 to 2009, the countywide median home price fell by 8.5 percent, while the decline in the Sierra Vista area was slightly



higher at 9.4 percent. While home prices have dropped, the declines have been more moderate than in other areas of the state and nation. According to the ACCRA Cost of Living Index, housing costs in Cochise County, which include both home prices and rental rates, were 5.4 percent below the national average in 2007. This rose to 3.1 percent above the national average in 2008 and 4.1 percent above the average in 2009. *BusinessWeek*, in its “Best and Worst Housing Markets of 2008” named Sierra Vista the best housing market in Arizona based on how well homes have held their value.

In 2009, the largest share of homes sold in the Sierra Vista area were those priced between \$187,000 and \$245,000, which accounted for 29.2 percent of total sales (note: This includes site-built homes, townhouses, and condominiums). The next highest sales volume was in the price range of \$129,000 to \$187,000, which accounted for 27.7 percent of all sales.

In 2009, existing homes in the Sierra Vista area sold for an average of 96.2 percent of the asking price, up slightly from 96.1 percent the year prior. Countywide, the average home sold for 95.5 percent of the asking price, down slightly from 95.7 percent. Homes that sold in the Sierra Vista area in 2009 were on the market for an average of 141 days, down from 146 in 2008. Countywide, homes that sold were on the market for an average of 148 days, down from 150 in 2008. The declines in the number of days on the market were the first since 2005 both countywide and in the Sierra Vista area.

## Manufactured Home Sales

Existing manufactured home sales in 2009, both in the Sierra Vista area and countywide, fell for the fourth consecutive year, although the declines were much more moderate than in 2008. While manufactured homes both in Sierra Vista and countywide held their values relatively well through 2008, the year 2009 saw steeper declines. Median prices dropped 9.7 percent in the Sierra Vista area, and 8.4 percent countywide in 2009. The average manufac-

### COCHISE COUNTY EXISTING HOME SALES (SITE-BUILT HOMES)

YEAR	VOLUME	CHANGE IN VOLUME	MEDIAN PRICE	MEDIAN PRICE CHANGE	AVERAGE SALE/ASKING PRICE	AVERAGE PRICE PER SQ FT (HEATED/COOLED)	AVERAGE PRICE PER SQ FT CHANGE (HEATED/COOLED)	AVERAGE DAYS ON MARKET
2004	1,472	—	\$150,000	—	97.8%	\$92.74	—	111
2005	1,703	15.7%	\$186,000	24.0%	98.4%	\$113.52	22.4%	107
2006	1,352	-20.6%	\$205,250	10.3%	97.6%	\$127.11	12.0%	114
2007	1,208	-10.7%	\$206,579	0.6%	96.4%	\$122.44	-3.7%	134
2008	987	-18.3%	\$195,000	-5.6%	95.7%	\$115.42	-5.7%	150
2009	984	-0.3%	\$189,000	-3.1%	95.5%	\$110.00	-4.7%	148

Note: Includes only those homes listed on Southeast Arizona Multiple Listing Service. Includes townhouses and condominiums. Source: Southeast Arizona Multiple Listing Service and Cochise College Center for Economic Research.

### SIERRA VISTA AREA EXISTING HOME SALES (SITE-BUILT HOMES)

YEAR	VOLUME	CHANGE IN VOLUME	MEDIAN PRICE	MEDIAN PRICE CHANGE	AVERAGE SALE/ASKING PRICE	AVERAGE PRICE PER SQ FT (HEATED/COOLED)	AVERAGE PRICE PER SQ FT CHANGE (HEATED/COOLED)	AVERAGE DAYS ON MARKET
2004	1,241	—	\$162,500	—	98.4%	\$97.25	—	103
2005	1,469	18.4%	\$199,900	23.0%	99.1%	\$118.67	22.0%	101
2006	1,100	-25.1%	\$216,713	8.4%	98.1%	\$132.77	11.9%	110
2007	961	-12.6%	\$217,479	0.4%	96.9%	\$128.48	-3.2%	135
2008	782	-18.6%	\$209,500	-3.7%	96.1%	\$122.31	-4.8%	146
2009	801	2.4%	\$197,000	-6.0%	96.2%	\$114.82	-6.1%	141

Note: Includes only those homes listed on Southeast Arizona Multiple Listing Service. Includes townhouses and condominiums. The Sierra Vista area includes Sierra Vista, Hereford, Huachuca City, Tombstone, and surrounding unincorporated areas. Source: Southeast Arizona Multiple Listing Service and Cochise College Center for Economic Research.

### EXISTING MANUFACTURED HOME SALES, COCHISE COUNTY

YEAR	VOLUME	CHANGE IN VOLUME	MEDIAN PRICE	MEDIAN PRICE CHANGE	AVERAGE SALE/ASKING PRICE	AVERAGE PRICE PER SQ FT (HEATED/COOLED)	AVERAGE PRICE PER SQ FT CHANGE (HEATED/COOLED)	AVERAGE DAYS ON MARKET
2004	217	—	\$76,000	—	93.7%	\$53.28	—	132
2005	273	25.8%	\$91,000	19.7%	96.5%	\$65.41	22.8%	131
2006	214	-21.6%	\$101,050	11.0%	95.1%	\$73.25	12.0%	129
2007	198	-7.5%	\$110,000	8.9%	94.1%	\$73.52	0.4%	147
2008	132	-33.3%	\$105,850	-3.8%	93.5%	\$68.79	-6.4%	158
2009	106	-19.7%	\$97,000	-8.4%	93.0%	\$63.36	-7.9%	164

Note: Includes only those homes listed on Southeast Arizona Multiple Listing Service. Includes mobile homes. Source: Southeast Arizona Multiple Listing Service and Cochise College Center for Economic Research.

### EXISTING MANUFACTURED HOME SALES, SIERRA VISTA AREA

YEAR	VOLUME	CHANGE IN VOLUME	MEDIAN PRICE	MEDIAN PRICE CHANGE	AVERAGE SALE/ASKING PRICE	AVERAGE PRICE PER SQ FT (HEATED/COOLED)	AVERAGE PRICE PER SQ FT CHANGE (HEATED/COOLED)	AVERAGE DAYS ON MARKET
2004	174	—	\$80,360	—	94.9%	\$56.30	—	123
2005	225	29.3%	\$97,000	20.7%	96.8%	\$66.86	18.8%	120
2006	172	-23.6%	\$110,000	13.4%	95.5%	\$75.36	12.7%	117
2007	154	-10.5%	\$115,500	5.0%	94.5%	\$75.19	-0.2%	140
2008	103	-33.1%	\$115,000	-0.4%	94.3%	\$69.56	-7.5%	156
2009	89	-13.6%	\$103,900	-9.7%	94.3%	\$65.81	-5.4%	165

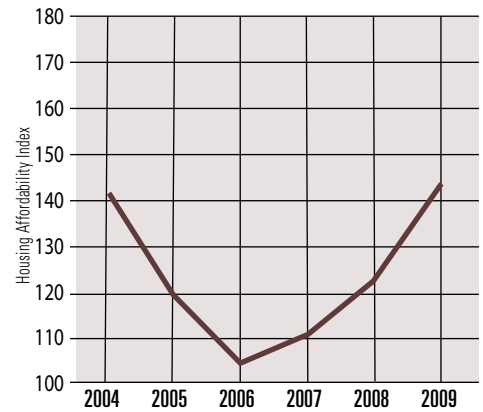
Note: Includes only those homes listed on Southeast Arizona Multiple Listing Service. Includes mobile homes. The Sierra Vista area includes Sierra Vista, Hereford, Huachuca City, Tombstone, and surrounding unincorporated areas. Source: Southeast Arizona Multiple Listing Service and Cochise College Center for Economic Research.

### SIERRA VISTA HOUSING AFFORDABILITY INDEX (HAI)

YEAR	MEDIAN FAMILY INCOME	MEDIAN HOME PRICE	AMOUNT FINANCED	EFFECTIVE INTEREST RATE	MONTHLY PRINCIPAL AND INTEREST PAYMENT	HAI
2004	\$51,499	\$157,750	\$126,200	6.02%	\$758	141.5
2005	\$52,983	\$191,385	\$153,108	6.08%	\$926	119.2
2006	\$54,468	\$212,000	\$169,600	6.64%	\$1,088	104.3
2007	\$55,952	\$213,000	\$170,400	6.24%	\$1,048	111.2
2008	\$59,611	\$206,500	\$165,200	6.18%	\$1,010	123.0
2009p	\$59,611	\$195,722	\$156,578	5.18%	\$858	144.7

p = preliminary. Note: Based on the median home price for residential homes (site built, manufactured homes, mobile homes, townhouses, and condominiums) in Sierra Vista sold on MLS. Presumes a 30-year conventional fixed-rate mortgage, a 20 percent down payment, and a 25 percent qualifying income ratio (principal and interest only). Source: Cochise College Center for Economic Research.

### SIERRA VISTA HOUSING AFFORDABILITY INDEX



Note: Based on the median home price for residential homes (site built, manufactured homes, mobile homes, townhouses, and condominiums) in Sierra Vista sold on MLS. Presumes a 30-year conventional fixed-rate mortgage, a 20 percent down payment, and a 25 percent qualifying income ratio (principal and interest only). Source: Cochise College Center for Economic Research.

tured home in the Sierra Vista area sold for 94.3 percent of the asking price in 2009, the same as in 2008. At the county level, the average manufactured home sold for 93 percent of the asking price in 2009, down slightly from 93.5 percent the year prior. In the Sierra Vista area, the average manufactured home that sold in 2009 was on the market for 165 days, up from 156 in 2008. Countywide, the average manufactured home that sold was on the market for 164 days, up from 158.

### Housing Affordability

According to U.S. Census Bureau data, the homeownership rate in Cochise County from 2006 to 2008 was 69.7 percent, up from 67.3 percent in 2000. In Sierra Vista, it was considerably lower at 57.8 percent for 2006 to 2008, up from 52.2 percent in 2000. A large contributor to the lower rates of homeownership in Sierra Vista is the military population, which tends to be younger and transient.

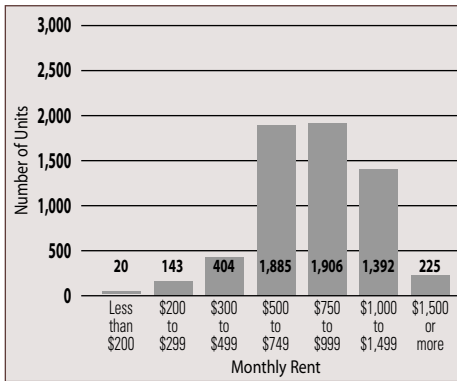
One of the primary influences on homeownership rates is affordability. The CER's Housing Affordability Index (HAI) gauges whether a family with the area's median income would qualify for a mortgage on a median-priced home. The HAI for Sierra Vista in 2009 was 144.7, its highest level in more than 5 years. This means that, in 2009, homes in Sierra Vista were the most affordable they have been in recent years.

In interpreting the HAI, a value of 100 indicates that a family with the median income has exactly enough income to qualify for a mortgage on a median-priced home, assuming a 20 percent down payment and a qualifying income ratio of 25 percent (i.e., the monthly principal and interest payment cannot exceed 25 percent of the family's monthly income). An HAI above 100 indicates that a family earning the median income has more than enough

income to qualify for a mortgage on a median-priced home. Thus, Sierra Vista's HAI of 144.7 indicates that a family with the median income had 144.7 percent of the income necessary to qualify for a conventional loan covering 80 percent of a median-priced, single-family home. In 2009, the estimated median family income for Sierra Vista was \$59,611 and the median home price was \$195,722 (includes site-built, manufactured, and mobile homes, and townhouses and condominiums). In calculating the HAI, the CER considers the average effective interest rate



### SIERRA VISTA RENTAL UNITS, 2006-2008



Note: Includes occupied rental units only. Source: U.S. Census Bureau, American Community Survey 2006-2008; and Cochise College Center for Economic Research.

### COMMERCIAL BUILDING PERMITS (NEW CONSTRUCTION), CITY OF SIERRA VISTA

YEAR	PERMITS	VALUATION	VALUATION CHANGE
2003	7	\$2,832,673	-86.0%
2004	13	\$7,305,606	157.9%
2005	14	\$18,468,233	152.8%
2006	40	\$61,258,338	231.7%
2007	24	\$43,160,924	-29.5%
2008	12	\$21,424,347	-50.4%
2009	15	\$43,747,931	104.2%

\* January through July only. Note: Value does not include land. Source: City of Sierra Vista and Cochise College Center for Economic Research.

(contract rate plus fees) on a fixed, 30-year conventional mortgage over the 12 month period as reported by the Federal Housing Finance Agency. In 2009, this rate was 5.18 percent.

In considering housing affordability in Sierra Vista, it is important to take into account the large number of military veterans residing in the area. From 2006 to 2008, 31.4 of Sierra Vista's population aged 18 years and older were civilian veterans of the military, compared to only 12.7 percent nationwide. The number of veterans in the area, in addition to the large number of active duty military personnel stationed at Fort Huachuca, is important to housing market analysis since most active duty military personnel and veterans finance their homes using Veterans Administration (VA) guaranteed loans. This leads to higher rates of home ownership among military personnel and veterans than there otherwise would be, but it also decreases the level of affordability of homes as determined by qualifying income ratios since VA loans are guaranteed without the traditional 20 percent down payment. This means affordability is often based on 100 percent of the home price rather than 80 percent, meaning affordable housing for this segment of the population is generally lower than for the non-veteran population, other things being equal.

## Rental Market

From 2006 to 2008, 43.7 percent of occupied housing units in Sierra Vista were renter-occupied, according to the U.S. Census Bureau. According to the Census Bureau, the rental vacancy rate in Sierra Vista from 2006 to 2008 was 13.3 percent. The largest number of occupied rental units in Sierra Vista from 2006 to 2008 rented between \$750 and \$999 per month, accounting for 31.9 percent of all rentals. Units renting for \$500 to \$749 accounted for 31.5 percent, while those renting for \$1,000 to \$1,499 accounted for 23.3 percent of the total. About 42.5 percent of renters in Sierra Vista from 2006 to 2008 paid 30 percent of their income or more for rental expenses (rent plus utilities) suggesting a considerable demand for affordable housing in the city. Thirty percent of gross income is a common threshold above which housing costs are considered to be not affordable.

## Commercial Construction

Sierra Vista has seen extraordinary growth in commercial construction in recent years. From 2005 through 2009, permits were issued for 105 new construction projects totaling more than \$188 million in capital investment. Although new commercial construction in Sierra Vista was down by nearly 30 percent in 2007 and was down by more than half in 2008, both years were well above historic trend levels. The year 2009 saw a strong surge, with new commercial real estate investment

surpassing 2007 levels in dollar value. The boom in commercial construction in Sierra Vista over the past few years, beginning immediately following the survival of Fort Huachuca through the Department of Defense's Base Realignment and Closure (BRAC) process, is evident in new hotels, restaurants, large retailers, office complexes, and other businesses throughout the city.

## Outlook

New home construction in the Sierra Vista area likely hit bottom in 2007 and is now on track to resume a pattern of normal growth. After weeding out the excesses of speculative building and subprime mortgages, modest growth rates are likely over the next few years.

Countywide, new home construction likely hit bottom in 2008 and remained there into the first half of 2009. Although permits were down overall from January through October 2009, when compared to the same period of 2008, permits in the third quarter of 2009 were 29.6 percent higher than in the third quarter of 2008 and permits were up in each month of the third quarter and into October. The strong performance in the latter part of 2009 may signal the beginning of a recovery for new construction countywide.

The existing home market in the Sierra Vista area likely bottomed out in 2008 and is on a path of recovery. Countywide, the market likely bottomed out in 2008 and remained there well into 2009. In the fourth quarter of 2009, however, sales at the county level were up more than 20 percent compared to the fourth quarter of 2008, which may signal the beginning of a recovery. Moderate growth in 2010 and beyond seems the most likely scenario at both the county level and in the Sierra Vista area. Home prices both in the Sierra Vista area and countywide should continue to hold relatively steady.

With large projects including a new Wal-Mart Supercenter and Sam's Club, although the latter has been delayed, and interest expressed by Olive Garden and International House of Pancakes, the commercial construction boom is likely to continue well into the national economic recovery. The continued relocation of defense contracting agencies from Fort Huachuca to downtown Sierra Vista as tenant agreements expire should continue to fuel the demand for commercial office space.





JP Morgan  
Chase Bank

## Bank deposits and bankruptcy filings

### Bank Deposits

Sierra Vista is served by five banks: Wells Fargo, J.P. Morgan Chase, National Bank of Arizona, Bank of America, and Compass. Bank deposits in Sierra Vista in 2009 totaled \$528.5 million, down 35.9 percent from 2008. The decline was due primarily to a surge in deposits to Bank of America the previous year as a result of its acquisition of Countrywide Financial, LaSalle Bank, and Merrill Lynch. The acquisitions initially resulted in funds being redirected to the local Bank of America office, driving up deposits. Likewise, deposits at the county level surged in 2008 led by the increase of deposits to Bank of America, then returned to normal levels in 2009. Excluding the surge in 2008, deposits in Sierra Vista were down 1 percent from 2007 while deposits at the county level were down 3.2 percent from 2007. (Note: Bank deposit data include only those deposits made to commercial banks. They do not include deposits to credit unions or other financial institutions. Annual deposits include those made each year in the 12 month period ending June 30.)

#### BANK DEPOSITS

YEAR	SIERRA VISTA		COCHISE COUNTY	
	AMOUNT	CHANGE	AMOUNT	CHANGE
2005	\$474,321,000	11.7%	\$904,994,000	9.8%
2006	\$548,599,000	15.7%	\$1,025,652,000	13.3%
2007	\$534,076,000	-2.6%	\$1,033,740,000	0.8%
2008	\$825,180,000	54.5%	\$1,295,970,000	25.4%
2009	\$528,537,000	-35.9%	\$1,000,155,000	-22.8%

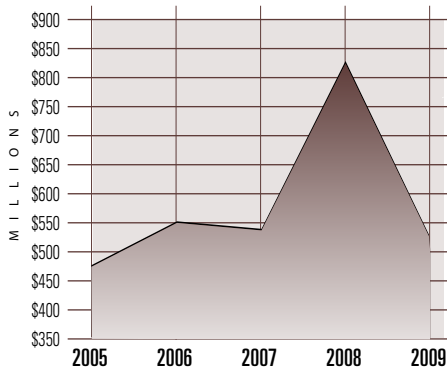
Note: Data reflect total deposits as of June 30 each year. Source: Federal Deposit Insurance Corporation and Cochise College Center for Economic Research.

### Bankruptcy Filings

In 2008, there were 234 bankruptcies filed from within Cochise County, up 30 percent from 2007. This was on the heels of a 42.9 percent increase in 2007. Adjusting for population size, Cochise County's bankruptcy rate in 2008 increased to 1.68 bankruptcies per 1,000 residents, up from 1.31 in 2007. The sharp

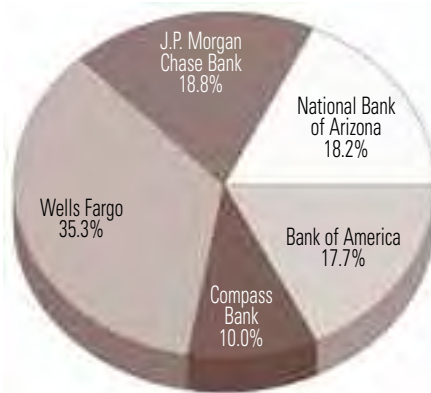


## SIERRA VISTA BANK DEPOSITS



Note: Data reflect total deposits as of June 30 each year. Source: Federal Deposit Insurance Corporation and Cochise College Center for Economic Research.

## SIERRA VISTA BANK DEPOSITS, MARKET SHARE (CITY), 2009



Source: Federal Deposit Insurance Corporation and the Cochise College Center for Economic Research.

## SIERRA VISTA BANK DEPOSITS, SHARE OF COCHISE COUNTY MARKET

YEAR	SHARE OF COCHISE COUNTY MARKET
2005	52.4%
2006	53.5%
2007	51.7%
2008	63.7%
2009	52.8%

Source: Federal Deposit Insurance Corporation and Cochise College Center for Economic Research.

increases in 2007 and 2008 followed a decline of 79.7 percent in 2006.

Despite the increases in 2007 and 2008, bankruptcy filings per 1,000 residents remained well below historic levels. The decline in 2006, which pushed bankruptcies to an historic low, was due primarily to the implementation of the Bankruptcy Abuse Prevention and Consumer Protection Act, which took effect in October 2005. The act requires that most individual debtors complete a special briefing from an approved credit counseling agency before filing for bankruptcy. The increases in 2007 and 2008 likely reflect a societal adjustment to the credit counseling requirements of the 2005 legislation. The year 2006 was the first full year the new requirements were in place, leading to the dramatic drop in filings that year.

Notwithstanding the increases in 2007 and 2008, filings at the county level remained considerably below filings at the state and national levels. In 2008, Cochise County's bankruptcy rate was 41.9 percent below the state level and 54.3 percent below the national level, reflecting a relatively healthy environment for lending and borrowing.

## COCHISE COUNTY BANKRUPTCY FILINGS

YEAR	POPULATION	TOTAL FILINGS	FILINGS PER 1,000 POP.
2004	129,600	504	3.89
2005	131,790	620	4.70
2006	135,150	126	0.93
2007	137,200	180	1.31
2008	139,434	234	1.68

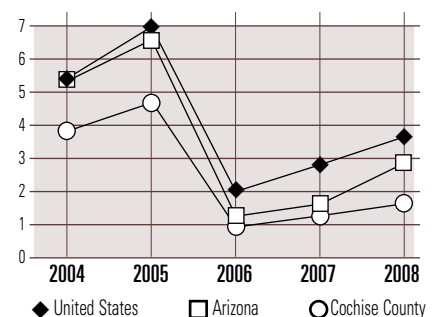
Source: U.S. Bankruptcy Court; U.S. Census Bureau; Arizona Department of Commerce; and Cochise College Center for Economic Research.

## BANKRUPTCY FILINGS (PER 1,000 RESIDENTS)

YEAR	COCHISE COUNTY	ARIZONA	UNITED STATES
2004	3.89	5.37	5.44
2005	4.70	6.62	7.01
2006	0.93	1.24	2.07
2007	1.31	1.68	2.66
2008	1.68	2.95	3.68

Source: U.S. Bankruptcy Court; U.S. Census Bureau; Arizona Department of Commerce; and Cochise College Center for Economic Research.

## BANKRUPTCY FILINGS (PER 1,000 RESIDENTS)



Source: U.S. Bankruptcy Court; U.S. Census Bureau; Arizona Department of Commerce; and Cochise College Center for Economic Research.



Douglas  
Border Patrol  
Station

## Mexico

### Overview

Cochise County's economy is significantly impacted by that of Mexico. The 82-mile shared border between Cochise County and Sonora, Mexico serves as a crossover point for millions of visitors from Mexico each year, ranging from day shoppers and workers who cross legally through the designated ports of entry at Douglas and Naco, to drug and illegal alien smugglers who cross illegally through the Sonoran desert. The Naco port of entry is located approximately 35 miles, and the Douglas port approximately 50 miles, southeast of Sierra Vista.

Cochise College Center for Economic Research (CER) focus group discussions in Sierra Vista indicate the city hosts a considerable number of Mexican shoppers, indicated by the large proportion of vehicles with license plates from Sonora, Mexico parked daily at the city's retail outlets. Trends in the number of shoppers from Mexico are likely impacted by the exchange rate between the U.S. Dollar and the Mexican Peso. A strong peso makes U.S. goods and services less expensive for Mexican visitors, encouraging shoppers to visit the United States, while a weak peso makes U.S. goods and services more expensive.

In early 2007, the exchange rate was just over 11 pesos to the dollar; this strengthened to just over 10 pesos to the dollar in the summer of 2008. Since then, the peso has weakened considerably, trading at over 12 pesos to the dollar in October and 13 pesos to the dollar in November 2008. The exchange rate hit 14 pesos to the dollar in January 2009 and 15 pesos to the dollar in February 2009. Since February 2009, the peso has strengthened, trading at just over 13 pesos to the dollar in all but one month from May through December 2009. In November 2009, the peso strengthened to just below 13 pesos to the dollar. Although the peso has strengthened somewhat since late 2008 and early 2009, it remains considerably weaker than in previous years, making U.S. goods and services more

### REPRESENTATIVE EXCHANGE RATES: MEXICAN PESO TO U.S. DOLLAR

2008	January	10.826200
	February	10.724300
	March	10.648200
	April	10.446400
	May	10.330600
	June	10.306900
	July	10.035300
	August	10.284700
	September	10.981400
	October	12.712500
	November	13.322500
	December	13.832500
2009	January	14.309700
	February	15.069800
	March	14.151700
	April	13.866700
	May	13.166700
	June	13.172200
	July	13.212500
	August	13.314000
	September	13.492800
	October	13.147900
	November	12.915700
	December	13.043700

Note: As of the last business day of each month. Rates vary daily. Source: International Monetary Fund.

expensive to Mexican shoppers. This is likely to continue to discourage Mexican shoppers from visiting the United States.

### U.S. Travelers to Mexico

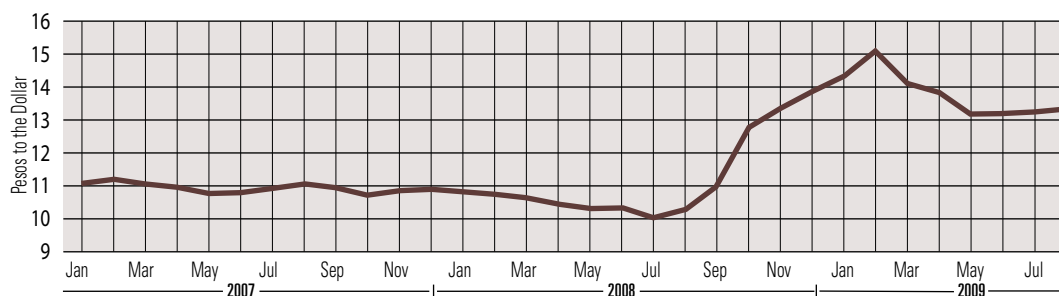
In addition to visitors from Mexico, the Douglas and Naco ports also serve as crossover points for more than 2 million U.S. visitors traveling to Mexico each year. As noted by the Arizona Department of Commerce, the Janos Highway (which begins in Douglas) is the shortest paved route from the western United States to Mexico City and Guadalajara.

In early 2008, a provision of the Western Hemisphere Travel Initiative (WHTI) took effect, which required U.S. citizens returning from Mexico to show a government-issued identification card (e.g., a driver's license) and proof of citizenship (e.g., a birth certificate). This likely has contributed to the decline in the number of U.S. citizens crossing the border. In Naco, U.S. citizen crossings were down 3.1 percent in the first 3 months of 2008; in Douglas, the decline was much steeper at 25.2 percent. In 2008, shortly after the provisions of the WHTI took effect, U.S. Customs and Border Protection discontinued reporting the numbers of U.S. visitors to Mexico crossing back into the United States, thus data on those crossings are no longer available.

Beginning June 1, 2009, most U.S. citizens entering the United States from Mexico must have a passport, passport card, or other travel document approved by the U.S. Department of Homeland Security. U.S. citizen children under the age of 16 may present the original or copy of their birth certificate, or other proof of U.S. citizenship such as a naturalization certificate or citizenship card. Groups of U.S. citizen children ages 16 through 18, when traveling with a school or religious group, social organization, or sports team, may enter under adult supervision with originals or copies of their birth certificates or other proof of citizenship. Visit [www.GetYouHome.gov](http://www.GetYouHome.gov) for more information on the new travel requirements.

Another factor potentially contributing to a decline in border crossings of U.S. residents into Mexico is concern over violence resulting from clashes between drug cartels and Mexican government officials in some Mexican border towns. U.S. media outlets have reported various statistics on the numbers of drug and gang-related killings throughout Mexico, and most note that such killings more than doubled from 2007 to 2008. The violence has been much more prevalent in Mexican cities sharing borders with Texas and California (particularly Ciudad Juarez and Tijuana, respectively) than in those areas sharing a border with Arizona. In October 2008, however, the U.S. State Department updated its travel alert for Mexico adding Nogales, Sonora to its list of Mexican cities in which U.S. travelers should exercise caution, citing a recent spate of violence including public shootouts during daylight hours in public venues. Nogales shares a border with neighboring Santa Cruz County. The State Department noted that criminals have followed and harassed U.S. citizens traveling in their vehicles in border areas, including Route 15 between Nogales and

### EXCHANGE RATE: MEXICAN PESO TO U.S. DOLLAR



Note: As of the last business day of each month. Rates vary daily. Source: International Monetary Fund.

Hermosillo. The State Department issues travel alerts to disseminate information about relatively short-term and/or transnational conditions posing significant risks to the security of American travelers. Alerts are made when there is a specific threat that cannot be countered. Alerts differ from travel warnings, which are issued when the State Department decides, based on all relevant information, to recommend that Americans avoid travel to a certain country. Nogales is the only Mexican city along the Arizona border that has been included in the State Department's travel alerts. Neither Agua Prieta nor Naco, which share a border with Cochise County, has been listed.

## Agua Prieta, Sonora

The City of Douglas, Arizona shares a border with Agua Prieta, Sonora, Mexico, approximately 50 miles southeast of Sierra Vista. With thousands of border crossings into the United States each day at the Douglas Port of Entry (POE), the city hosts many foreign shoppers, workers, and other visitors. A 2007-2008 study conducted by the University of Arizona indicated that 81.6 percent of Mexico residents entering the United States through the Douglas port did so for the purpose of shopping—the highest proportion of all ports of entry in the State of Arizona.

Population estimates for Agua Prieta vary widely, generally ranging from about 60,000 to 150,000, although some estimates have placed the city's population close to 200,000. According to figures provided by the Agua Prieta Municipal Government, the city's population in 2006 was 100,000, of which 35 percent were economically active. The city's unemployment rate in 2006 was 15 percent, with a total labor force of 35,000, according to municipal government figures.

Agua Prieta was traditionally a ranching, farming, and copper smelting community, but since the passage of the North American Free Trade Agreement (NAFTA) in 1993 the town has seen a significant increase in maquiladoras (twin factories), which are foreign-owned factories that manufacture and assemble products for export. Major industrial employers in Agua Prieta as of 2006 were Levolor Kirsh, a blinds manufacturer employing 2,100 workers; Commercial Vehicle Group, an automotive manufacturer employing 2,000 workers; Takata, a seat belt/harness manufacturer employing 1,200 workers; Velcro USA, a textile and Velcro products manufacturer employing 850 workers; and Standex International, an electronics manufacturer employing 965 workers. In 2008, Alstyle Apparel & Activewear announced it would open a new 700,000 square-foot manufacturing facility in Agua Prieta. The facility will include knitting, dying, cutting, sewing, and distribution and will employ approximately 2,500 workers. The facility is expected to be operational by 2011.

Agua Prieta's general infrastructure, according to the municipal government, includes 50 hotels and motels, 30 restaurants, a museum, two theaters, two bookstores, five private clubs, a bowling

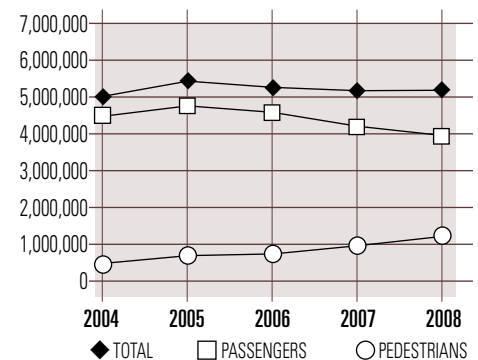
A 2007-2008 study conducted by the University of Arizona indicated that 81.6 percent of Mexico residents entering the United States through the Douglas port did so for the purpose of shopping

### US-MEXICO BORDER CROSSINGS, DOUGLAS PORT

	VEHICLES		PASSENGERS		PEDESTRIANS		(PASSENGERS & PEDESTRIANS) TOTAL	
	CROSSINGS	% CHANGE	CROSSINGS	% CHANGE	CROSSINGS	% CHANGE	CROSSINGS	% CHANGE
2004	2,120,724	-0.1%	4,490,950	-11.6%	540,623	-30.4%	5,031,573	-14.5%
2005	2,137,150	0.8%	4,727,538	5.3%	712,435	31.8%	5,439,973	8.1%
2006	1,983,618	-7.2%	4,557,279	-3.6%	760,211	6.7%	5,317,490	-2.3%
2007	1,776,456	-10.4%	4,155,386	-8.8%	1,014,174	33.4%	5,169,560	-2.8%
2008	1,711,176	-3.7%	3,921,971	-5.6%	1,289,903	27.2%	5,211,874	0.8%
2009*	1,389,911	-11.7%	3,046,122	-15.5%	1,163,322	-0.7%	5,599,355	-11.8%

\*January through November only; percent change based on comparison to same period one year prior. Note: Includes only those crossing from Mexico into the United States. Source: U.S. Customs and Border Protection and the University of Arizona's Economic and Business Research Center.

### US-MEXICO BORDER CROSSINGS: DOUGLAS PORT



Note: Includes only those crossing from Mexico into the United States. Source: U.S. Customs and Border Protection and the University of Arizona's Economic and Business Research Center.

club, two gymnasiums, two shopping centers, seven gas stations, six local radio stations (AM/FM), three supermarkets/food stores, three local newspapers, a post office, six main banks, six private hospitals, three public hospitals, and two sports arenas. Transportation infrastructure includes six national, intercity bus companies; a local public transport intra-city bus system with 25 routes; eight local and international trucking companies; a rail line; and an interstate airline.

The Douglas POE for vehicle and pedestrian traffic is open 24 hours a day, 7 days a week. Between 2003 and 2007, an average of more than 5.4 million people each year (more than 14,700 per day) passed through the Douglas port from Agua Prieta into Douglas. About 60 percent of these were non-U.S. citizens, while 40 percent were U.S. citizens returning from Mexico. In 2008, shortly after the implementation of the WHTI travel restrictions on U.S. citizens, U.S. Customs and Border Protection discontinued reporting the numbers of U.S. visitors to Mexico crossing back into the United States, thus data on those crossings are no longer available. In 2008, vehicle crossings through the Douglas port from Agua Prieta into Douglas were down by 3.7 percent and the number of vehicle passengers was down by 5.6 percent. Pedestrian traffic into Douglas from Agua Prieta was up by 27.2 percent in 2008. In the first 11 months of 2009, vehicle crossings were down by 11.7 percent, the number of vehicle passengers was down by 15.5 percent, and pedestrian traffic was down 0.7 percent, compared to the same period the year prior. Overall, the number of visitors (passengers and pedestrians) crossing into Douglas was down by 11.8 percent in the first 11 months of 2009.

#### DOUGLAS INTERNATIONAL PORT AUTHORITY

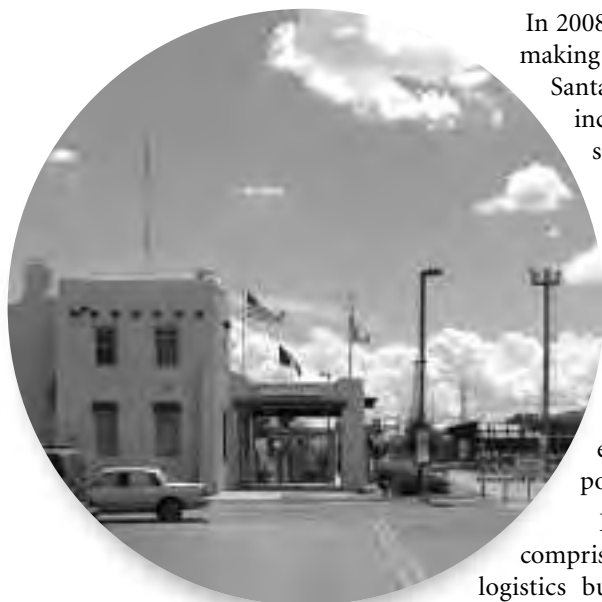
In 2008, the Douglas International Port Authority, Inc. (DIPA) was incorporated making it the state's third port authority (the other two are the Greater Nogales Santa Cruz County Port Authority and the Greater Yuma Port Authority). The incorporation of DIPA was the result of numerous discussions and planning sessions that began in 2007. The Douglas POE is the second largest commercial port in Arizona with over \$1 billion in trade conducted every year.

The basic mission of DIPA is to promote trade and commerce. High on its priority list is the expansion and further development of the Douglas POE. DIPA sees the new commercial POE and enhanced pedestrian and privately owned vehicle services as being essential to further growth and prosperity of the region on both sides of the border. According to DIPA, increased amounts of logistical traffic to the port will expand economic activity for both U.S. and Mexico and increase the potential for more jobs and growth for their respective communities.

DIPA incorporated as a nonprofit, private organization. The authority comprises and is directed by area executives representative of the trade and logistics business service sector, cross-border manufacturing, and agribusiness industries, as well as community and economic development. Areas of focus for DIPA will be integrating key stakeholders in the process to impact the reconfiguration of the Douglas POE and garner support at all levels of the project; designing and implementing key strategies for the development and expansion of trade and industry; and providing a forum for port users to interact with appropriate governmental agencies. DIPA intends to play a pivotal role in the future development and growth of Douglas, Agua Prieta, and the region. DIPA believes that the Douglas POE can currently serve as an efficient alternative to the congested port of Nogales, resulting in what could be a viable eastern passage of the CANAMEX corridor.

#### Naco, Sonora

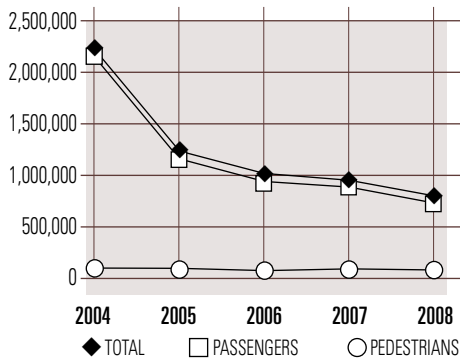
The town of Naco, Sonora, Mexico shares a border with Naco, Arizona, an unincorporated area of Cochise County approximately 35 miles southeast of Sierra Vista. The population of Naco, Sonora as of 2000 was 5,370, according to Mexico's Instituto Nacional de Estadística y Geografía



The town of Naco, Sonora, Mexico shares a border with Naco, Arizona



### US-MEXICO BORDER CROSSINGS: NACO PORT



Note: Includes only those crossing from Mexico into the United States.  
Source: U.S. Customs and Border Protection and the University of Arizona's Economic and Business Research Center.

### US-MEXICO BORDER CROSSINGS, NACO PORT

	VEHICLES		PASSENGERS		PEDESTRIANS		(PASSENGERS & PEDESTRIANS) TOTAL	
	CROSSINGS	% CHANGE	CROSSINGS	% CHANGE	CROSSINGS	% CHANGE	CROSSINGS	% CHANGE
2004	345,959	0.7%	2,140,185	30.8%	91,694	18.3%	2,231,879	30.3%
2005	320,432	-7.4%	1,133,186	-47.1%	99,879	8.9%	1,233,065	-44.8%
2006	321,357	0.3%	915,501	-19.2%	90,020	-9.9%	1,005,521	-18.5%
2007	323,422	0.6%	866,682	-5.3%	97,729	8.6%	964,411	-4.1%
2008	266,225	-17.7%	708,382	-18.3%	89,174	-8.8%	797,556	-17.3%
2009*	253,831	5.0%	614,661	-4.3%	76,589	-7.6%	691,250	-4.7%

\*January through November only; percent change based on comparison to same period one year prior. Note: Includes only those crossing from Mexico into the United States. Source: U.S. Customs and Border Protection and the University of Arizona's Economic and Business Research Center.

(INEGI). The population of the Naco, Arizona Census Designated Place (CDP) as of 2000 was 833, according to the U.S. Census Bureau.

With thousands of border crossings into the United States each day at the Naco POE, the area serves as a gateway to Cochise County's retail shopping outlets. A 2007-2008 study conducted by the University of Arizona indicated that 80.1 percent of Mexico residents entering the United States through the Naco port did so for the purpose of shopping—the second highest proportion of all ports of entry in the State of Arizona behind Douglas, also located in Cochise County.

The Naco POE for vehicle and pedestrian traffic is open 24 hours a day, 7 days a week. Between 2003 and 2007, an average of 1.4 million people each year (more than 3,900 per day) passed through the Naco port from Mexico into the United States. About 75 percent of these were non-U.S. citizens, while 25 percent were U.S. citizens returning from Mexico. In 2008, U.S. Customs and Border Protection discontinued reporting the numbers of U.S. visitors to Mexico crossing back into the United States, thus data on those crossings are no longer available. In 2008, vehicle crossings through the Naco port from Naco, Sonora into Naco, Arizona were down 17.7 percent and the number of vehicle passengers was down by 18.3 percent. Pedestrian traffic into the United States from Naco was down by 8.8 percent in 2008. In the first 11 months of 2009, vehicle crossings were up by 5 percent, the number of vehicle passengers was down by 4.3 percent, and pedestrian traffic was down 7.6 percent, compared to the same period the year prior. Overall, the number of visitors (passengers and pedestrians) crossing into Naco was down by 4.7 percent in the first 11 months of 2009.

### Economic Impact of Mexican Visitors

A 2007-2008 study conducted by the University of Arizona measured the economic impact of Mexican visitors to Arizona. The study found that Mexican visitors to Cochise County accounted for 5.3 percent of countywide taxable sales. Mexican visitors spent \$186.4 million in Cochise County, up 92.6 percent from 2001. More than two-thirds of spending by Mexican visitors to Cochise County occurred in Douglas, according to the study.

Fifty-five percent of expenditures by Mexican visitors to Cochise County occurred in retail stores, 24.1 percent occurred in grocery stores, and 7.3 percent occurred in restaurants. According to the study, the direct spending by Mexican visitors to Cochise County resulted in 1,498 jobs and \$28.8 million in earnings. Accounting for indirect impacts, Mexican visitors were responsible for \$211.8 million in sales, 1,763 jobs, and \$36.5 million in earnings countywide.

Approximately 3,200 active duty military personnel, along with their family members, are assigned to the fort  
Photo: Fort Huachuca Public Affairs Office



## Fort Huachuca

Fort Huachuca is an active U.S. Army installation located in Sierra Vista. As of September 30, 2009, approximately 3,200 active duty military personnel, along with their family members, are assigned to the fort. There are also approximately 3,200 military trainees (students) temporarily assigned to the fort at any given time for training.

As of September 30, 2009, the resident population of Fort Huachuca was approximately 6,791, which included 1,045 military personnel and 2,805 military family members residing in on-post housing, along with 2,941 unmarried or unaccompanied military personnel residing in troop billets, including students assigned temporarily to the fort for training. Many military personnel and their families also reside in Sierra Vista and surrounding communities. Students assigned temporarily to the fort for training typically are not accompanied by family members. In such cases, service members' family members remain at their permanent duty stations or they relocate to follow-on duty stations for those service members who attend training at Fort Huachuca in between assignments. For soldiers attending initial entry training, the military does not authorize travel of their family members to Fort Huachuca except in rare cases.

In January 2010, the Department of the Army announced the planned relocation of the 86th Signal Battalion from Fort Huachuca to Fort Bliss, Texas. This force structure action represents an increase of 487 military authorizations and one civilian authorization at Fort Bliss and a decrease of 487 military authorizations and one civilian authorization at Fort Huachuca. Implementation of these changes is scheduled to be complete in July 2011.

The 86th Signal Battalion provides Command Post nodes in support of Combatant Commanders, Army Service Component Commanders, Joint Task Force Commanders, Joint Land Force Component Commanders, Coalition Headquarters, Army support to other Services, Theater

Army Commands, functional brigades, and task organized battalions in support of functional and multifunctional brigades.

The number of housing units on post is projected to decline from approximately 1,275 in 2009 to approximately 1,075 in 2014. The net decline will result from the demolition of older housing units and the construction of fewer units to replace them. This may result in an increased demand for off-post housing in Sierra Vista and surrounding communities. Housing communities on post will be developed and homes will be constructed by private-sector firms as part of the Army's wider housing privatization efforts under its Residential Communities Initiative.

## Economic Impact

### COCHISE COUNTY'S TOP EMPLOYER

In 2009, Fort Huachuca remained Cochise County's top employer, according to the Cochise College Center for Economic Research's (CER's) annual Top 75 Employer Survey. Fort Huachuca has been the top employer in Cochise County every year since the CER began conducting the survey in 1999. According to *Arizona Daily Star's* annual "Star 200" employer survey, the fort was the seventh largest employer in all of Southern Arizona in 2009.

As of the CER's 2009 top employer survey, conducted in July 2009, Fort Huachuca employed 10,146 fulltime equivalent (FTE) employees, which included 3,266 active duty military personnel permanently assigned to the fort, 2,842 Department of the Army civilian employees, 127 part-time civilian employees directly employed by the fort, and about 3,974 military students present at the fort for training. Although the fort trains more than 15,000 students each year, students arrive and depart at various times throughout the year, with approximately 3,974 present on any given day, as of the CER's most recent survey. (Note: The CER survey counts military students as fulltime employees based on a typical 40 hour workweek and pay levels and benefits associated with fulltime employment; Fort Huachuca counts students as part-time employees based on the fact they are stationed only temporarily at the fort. To account for the fact that students are assigned to the fort only temporarily, the CER uses the number of students present at any given time [3,974] in its computations, rather than the 15,000 trained throughout the year. Due to the guidelines used in the CER survey, which is aimed at measuring the employment impact delineating between 40-hour and 20-hour a week employees, the number of fulltime equivalent employees reported by the CER for Fort Huachuca is higher than the number reported by the fort.)

An FTE employee is equal to one fulltime or two part-time employees. The fort's number of FTE employees includes only those workers employed directly by the fort. Not included in the fort's numbers are workers who report to work on Fort Huachuca but are not employed directly by the fort. These include employees of defense contracting firms in the Sierra Vista area, who are reported by the contracting firms that directly employ them. These include Northrop Grumman Corporation, which is the county's fifth largest employer, and NewTec, LLC, which is the county's 12th largest employer. In 2009, seven of Cochise County's top 75 employers were professional and business service firms whose customer base, in whole or part, was Fort Huachuca. This included Northrop Grumman, NewTec, Science Applications International Corporation (SAIC), ManTech Telecommunications and Information Systems Corporation, L3 Communications Command & Control Systems and Software (C2S2), Integrated Systems Improvement Services (ISIS), and All Star Technical Services. Combined, these seven firms employed 2,301 FTE employees in 2009, or 9 percent of the total workers employed by the county's 75 largest employers. Not all of these employees work in direct support of the fort as several of the firms have customer bases well beyond Fort Huachuca. For example, Northrop Grumman and SAIC serve customers across the United States and internationally from their sites in Sierra Vista, but also do a small portion of business in support of the fort.

Also not included in the fort's numbers are employees of the Fort Huachuca Accommodation Schools (FHAS), which reports its employees separately and was the county's 35th largest employer in 2009. Although located on Fort Huachuca, FHAS schools are Arizona public schools that fall under the Arizona Department of Education. The FTE numbers also do not include employees of

the AAFES Post Exchange (PX), U.S. Post Office, colleges and universities, and concessionaires located on post.

### THE MAGUIRE REPORT

In 2008, the Maguire Company, in collaboration with ESI Corp, released the results of its *Economic Impact of Arizona's Principal Military Operations* study, commonly referred to as the Maguire Report. According to the study, the direct, indirect, and induced employment impact of Fort Huachuca on Cochise County was 26,921 FTE jobs, which includes the fort's direct employees, as well as those employed due to government contracts and spending by the fort and its employees.

Nearly 83 percent of the indirect and induced employment generated by Fort Huachuca occurred in the county's retail trade and services industries. The total economic impact of the fort on Cochise County was estimated at \$2.4 billion annually. Nearly 42 percent of this impact was the result of indirect and induced economic activity in the county's retail trade and services industries. The report also estimated that the direct, indirect, and induced economic activity of Fort Huachuca generated \$23.2 million per year in local sales tax and \$17.3 million in local property tax in Cochise County.



Photo: Fort  
Huachuca Public  
Affairs Office

### U.S. Fish and Wildlife Biological Opinion

In recent years, water use by the fort, as well as water use that results from Fort Huachuca's indirect and induced employment, and any resultant population increases, have been an environmental issue. A June 2007 biological opinion issued by U.S. Fish and Wildlife Service (FWS) examined the environmental impact and concluded that the proposed ongoing and future military operations and activities at Fort Huachuca were not likely to adversely affect endangered species. The biological opinion noted that Fort Huachuca has been a recognized leader in energy and water reduction initiatives for more than a decade; water use had been reduced by over 50 percent, or over half a billion gallons per year; the fort had been below the federal energy conservation goals for more than a decade; and the fort had increased the use of renewable energy in the form of solar and wind, neither of which consume water in the production of electricity. Perhaps most important to the future of Fort Huachuca, the FWS biological opinion determined that Fort Huachuca can accommodate additional growth, accomplish the mission, and continue to meet water conservation measures.

### History

Fort Huachuca is a National Historic Landmark. The fort was established during the Indian Wars of the 1870s and 1880s. In 1877, Camp Huachuca was established to protect settlers and travel routes in southeastern Arizona and block Apache escape routes through the San Pedro and Santa Cruz valleys into Mexico. Camp Huachuca was designated a fort in 1882.

Following Geronimo's surrender in 1886, the Army closed more than 50 camps and forts in the Arizona territory. Fort Huachuca was retained due to continuing border troubles. In 1913, the 10th Cavalry "Buffalo Soldiers" arrived and remained almost 20 years. The 10th Cavalry joined General John J. Pershing in the 1916 expedition into Mexico. During World War I, the fort was assigned the mission of guarding the U.S.-Mexico border.

Following World War II, the fort was declared surplus and transferred to the State of Arizona. It was reactivated during the Korean War by the Army Engineers. In 1954, control passed to the Chief Signal Officer, who found the area and climate ideal for testing electronic and communications equipment, a characteristic that remains today.

In 1967, Fort Huachuca became headquarters to the U.S. Army Strategic Communications Command. In 1971, the fort became home to the U.S. Army Intelligence Center and School. Also in 1971, the fort was annexed into Sierra Vista, bringing additional tax revenue to the city and Cochise County.

Today, Fort Huachuca is a major military installation in Arizona, and one of prominence throughout the Southwest. Units on the fort include the Joint Interoperability Test Command, Raymond W. Bliss Army Community Health Center, the 11th Signal Brigade, the Unmanned Aerial Systems Training Battalion of the U.S. Army Aviation Center, U.S. Army Electronic Proving Ground, U.S. Army Information Systems Engineering Command, U.S. Army Intelligence Center of Excellence, U.S. Army Network Enterprise Technology Command, and the newly established Department of Defense Joint Center of Excellence for Human Intelligence Training. In 2005, Fort Huachuca became home to the world's largest Unmanned Aerial Systems (UAS) training facility with the opening of a \$10 million, 25,000-square-foot UAS Training Center Annex, bringing the total UAV training area to 125,000 square feet. For more information on Fort Huachuca, visit [www.huachuca.army.mil](http://www.huachuca.army.mil).



Photo: Fort Huachuca Public Affairs Office



Photo: City of Sierra Vista



Agriculture remains a significant part of the Cochise County economy



## Cochise County agriculture

Agriculture remains a significant part of the Cochise County economy. Most of the county's agricultural production occurs in the eastern part of the county in the Sulphur Springs Valley, although considerable production continues in the San Pedro Valley.

In 2007, top crop items by acreage in Cochise County included forage land, corn for grain, pecans, corn for silage, and harvested vegetables. Top livestock inventory items by number were cattle and calves (mostly beef cows), layers, horses and ponies, goats, and bee colonies.

Between 2002 and 2007, the number of farms in Cochise County grew by 115, or 12.1 percent, from 950 to 1,065. This was mostly the result of a deconsolidation of farmland, evidenced by the decline in total farm acreage from 970,000 acres in 2002 to 825,000 acres in 2007, despite growth in the number of farms. The average farm size in the county decreased from 1,020 acres in 2002 to 774 acres in 2007.

Although the size of farms decreased between 2002 and 2007, the value of land and buildings on farms increased. Countywide, the average value of land and buildings per farm more than doubled from \$705,000 to \$1.5 million. The average market value of land and buildings per acre of farmland more than tripled, from \$631 to \$1,907. The estimated market value of machinery and equipment per farm in Cochise County grew by nearly one-half, from \$53,000 to \$78,000.

The changing structure of farms in Cochise County between 2002 and 2007 was characterized by an increase in the number of farms of all size classes, except those that were 1,000 acres or more, which stabilized at 2002 levels. Most of the growth in the number of farms occurred in smaller farms, particularly those that were 179 acres or smaller. In terms of the market value of agricultural products sold, the number of farms with annual sales valuing less than \$2,500 grew by 35 percent from 363 to 490. At the same time, the number of farms with sales of \$100,000 or more declined by

10 percent from 120 to 108.

Although the area of farmland in Cochise County declined by 15 percent between 2002 and 2007, the market value of agricultural products sold grew by nearly 50 percent from \$78.3 to \$117.1 million. The majority of these products were crops, which accounted for 63 percent of total agricultural products countywide in 2007, down from 71.2 percent in 2002. The market value of crops in 2007 was \$74.4 million, up 33.4 percent from \$55.7 million in 2002. The market value of livestock sales increased 89.5 percent, from \$22.6 to \$42.8 million.

Although the total acreage of farms in Cochise County decreased considerably from 2002 to 2007, the total output expanded along with the value of land, buildings, and machinery. This is likely attributable to the development and procurement of more technologically advanced equipment, making farm work less labor intensive, as well as the more efficient use of land resources to increase output per acre.

### COCHISE COUNTY AGRICULTURE

	2007	2002	CHANGE	% CHANGE
Farms (number)	1,065	950	115	12.1%
Land in farms (acres)	824,226	969,253	-145,027	-15.0%
Land in farms - Average size of farm (acres)	774	1,020	-246	-24.1%
Estimated market value of land and buildings - Average per farm (dollars)	\$1,475,858	\$704,895	770,963	109.4%
Estimated market value of land and buildings - Average per acre (dollars)	\$1,907	\$631	1,276	202.2%
Estimated market value of all machinery and equipment - Average per farm (dollars)	\$77,792	\$53,260	24,532	46.1%
Farms by size - 1 to 9 acres	122	110	12	10.9%
Farms by size - 10 to 49 acres	252	211	41	19.4%
Farms by size - 50 to 179 acres	285	227	58	25.6%
Farms by size - 180 to 499 acres	149	147	2	1.4%
Farms by size - 500 to 999 acres	76	74	2	2.7%
Farms by size - 1,000 acres or more	181	181	0	0.0%
Total cropland (farms)	496	557	-61	-11.0%
Total cropland (acres)	141,156	131,382	9,774	7.4%
Irrigated land (farms)	368	460	-92	-20.0%
Irrigated land (acres)	67,598	64,593	3,005	4.7%
Market value of agricultural products sold (\$1,000)	\$117,130	\$78,307	38,823	49.6%
Market value of agricultural products sold - Average per farm (dollars)	\$109,981	\$82,429	27,552	33.4%
Market value of agricultural products sold - Crops (\$1,000)	\$74,358	\$55,737	18,621	33.4%
Market value of agricultural products sold - Livestock, poultry, and their products (\$1,000)	\$42,771	\$22,570	20,201	89.5%
Farms by value of sales - Less than \$2,500	490	363	127	35.0%
Farms by value of sales - \$2,500 to \$4,999	119	97	22	22.7%
Farms by value of sales - \$5,000 to \$9,999	91	118	-27	-22.9%
Farms by value of sales - \$10,000 to \$24,999	120	111	9	8.1%
Farms by value of sales - \$25,000 to \$49,999	87	82	5	6.1%
Farms by value of sales - \$50,000 to \$99,999	50	59	-9	-15.3%
Farms by value of sales - \$100,000 or more	108	120	-12	-10.0%

Source: U.S. Department of Agriculture and the Cochise College Center for Economic Research.

Coronado  
Cave  
Photo: City of  
Sierra Vista



## Tourism

### General Overview

Tourism is an important component of the economy of both Sierra Vista and Cochise County. As an export-oriented industry, tourism brings dollars to the local area from other regions. This generates local sales, jobs, and tax revenue in addition to that generated by the spending of local residents. According to a study by Dean Runyon & Associates, the travel industry has been one of the top two export-oriented industries in Arizona as measured by its contribution to the state's Gross Domestic Product.

Tourism is often defined broadly to encompass all travel-related activity, including both business and leisure travel. This broader industry is sometimes referred to as tourism and travel. In Sierra Vista and Cochise County, this includes military and Department of Defense civilian and contractor personnel on temporary duty to Fort Huachuca for training, attendance at conferences, or other military or defense-related activities. It also includes other government travel unrelated to the fort. As of October 1, 2009, the government per diem rate for lodging in Sierra Vista was \$83, up from \$78 the year prior.

Despite the inclusion of both business and leisure travelers in the broadly defined tourism and travel industry, the distinction between business and leisure travel is useful for several reasons. One reason is that leisure travelers are likely to be more responsive to marketing efforts since they tend to have greater flexibility regarding such decisions as modes of travel, the amount of money to spend on lodging, and the duration of their stay.

Although spending patterns of business and leisure travelers are similar in many ways, there are some important differences. For example, leisure travelers are likely to have more free time, so they may spend more money on recreational activities. They also may have budgeted for larger sums of

money to spend during their stay in order to maximize their vacationing experience. Business travelers may be more apt to spend at levels closer to their normal spending habits with the exception of the added expenses directly related to the travel.

Cochise County communities, including Sierra Vista, have joined together to form the Cochise County Tourism Council. The marketing efforts of the council, which are funded by the individual communities, Cochise County, and grant dollars from the Arizona Office of Tourism (AOT), market Cochise County as a single entity. For more information visit [www.ExploreCochise.com](http://www.ExploreCochise.com) and [www.VisitSierraVista.com](http://www.VisitSierraVista.com).

## Attractions and Activities

Sierra Vista and surrounding areas have attractions and activities that lure hundreds of thousands of visitors annually. The City of Sierra Vista's Communication & Marketing Division classifies this as geotourism, which it defines as tourism that sustains or enhances the geographical character of a place, including its environment, culture, aesthetics, heritage, and well-being of residents. According to the city's Communication & Marketing Division, geotourism builds on what it refers to as Sierra Vista's "sense of place" to emphasize the distinctiveness of its locale to the benefit of both visitors and residents.

According to recent Communication & Marketing Division data, bird watching continues to increase in popularity and has become a multimillion dollar activity in the Sierra Vista area. The division notes that Sierra Vista and surrounding areas are considered to be one of the top birding destinations in the nation, and a large proportion of the city's visitor base has consisted of birders and other geotourists. Affluent birding enthusiasts contribute a substantial portion of tourism dollars to Sierra Vista businesses and attractions, according to the Communication & Marketing Division.

### RAMSEY CANYON PRESERVE

A popular destination of geotourists is the Nature Conservancy's Ramsey Canyon Preserve, located just outside Sierra Vista. The preserve is known worldwide for the number of species of hummingbirds attracted to and sighted within the canyon, which has led to Sierra Vista being known as the "Hummingbird Capital of the United States." With 20,000 visitors annually, the preserve caters to bird and wildlife enthusiasts from across the United States, as well as international visitors. For more information, visit [www.nature.org/wherewework/northamerica/states/arizona/preserves](http://www.nature.org/wherewework/northamerica/states/arizona/preserves).

### SAN PEDRO RIPARIAN NATIONAL CONSERVATION AREA

Another popular birding area is the San Pedro Riparian National Conservation Area (SPRNCA). The SPRNCA, which is managed by the U.S. Bureau of Land Management, is home to 350 species of migrating and breeding birds—nearly one-half the number of known breeding species in North America. Thousands of bird and wildlife watchers and other geotourists visit the

### SIERRA VISTA VISITOR CENTER, VISITOR COUNTS

	1ST QTR	CHANGE	2ND QTR	CHANGE	3RD QTR	CHANGE	4TH QTR	CHANGE	ANNUAL	CHANGE
2005	6,174	-1.7%	3,636	0.1%	2,793	-19.0%	3,438	-7.7%	16,041	-6.1%
2006	6,972	12.9%	3,914	7.6%	2,613	-6.4%	3,521	2.4%	17,020	6.1%
2007	6,280	-9.9%	3,998	2.1%	6,121	134.3%	5,889	67.3%	22,288	31.0%
2008	10,966	74.6%	6,031	50.9%	5,233	-14.5%	4,399	-25.3%	26,629	19.5%
2009	8,518	-22.3%	4,578	-24.1%	3,994	-23.7%	4,343	-1.3%	21,433	-19.5%

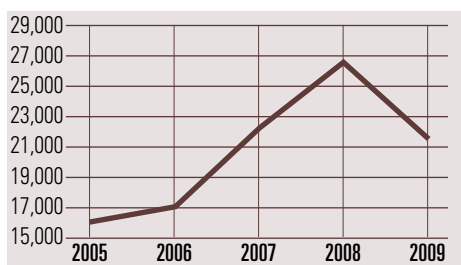
Source: Sierra Vista Convention & Visitors Bureau and Cochise College Center for Economic Research.

40 miles of riverbank along the San Pedro River each year. For more information, visit [www.blm.gov/az/st/en/prog/blm\\_special\\_areas/ncarea/sprnca.html](http://www.blm.gov/az/st/en/prog/blm_special_areas/ncarea/sprnca.html).

### OTHER GEOTOURISM ATTRACTIONS

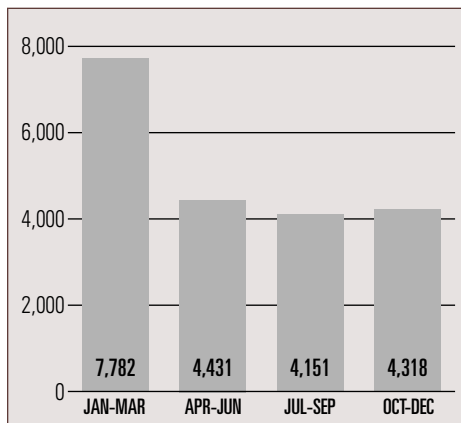
Other popular geotourism attractions include the Environmental Operations Park, the Coronado National Memorial, and Garden Canyon on Fort Huachuca. The Environmental Operations Park is a water recharge and municipal native grass restoration project. It is common to see wildlife and water birds at this wetland. The Coronado National Memorial—the largest memorial in the National Park Service—was established in 1952 and has 4,750 acres of natural habitat for hikers and bicyclists. Garden Canyon has marked trails, bird and wildlife, and ancient pictographs.

**SIERRA VISTA VISITOR CENTER  
VISITOR COUNTS**



Source: Sierra Vista Visitor Center and Cochise College Center for Economic Research.

**SIERRA VISTA VISITOR CENTER, VISITOR  
COUNTS, AVERAGE BY QUARTER**



Based on data from 2005-2009. Source: Sierra Vista Visitor Center and Cochise College Center for Economic Research.

### NEARBY ATTRACTIONS

The Sierra Vista area is home to numerous other attractions and destinations, including the Amerind Foundation and Museum; Arizona Folklore Preserve; the city of Bisbee; Chiricahua National Monument; Sierra Vista's aquatic center "The Cove"; Henry Hauser Museum; Kartchner Caverns State Park; Lehner Mammoth Kill Site; Murray Springs Clovis Site; the city of Tombstone; 16 public and private observatories; and several Arizona wineries. For more information on tourism in the Sierra Vista area, visit [www.VisitSierraVista.com](http://www.VisitSierraVista.com). For information on tourism throughout Cochise County, contact the Cochise County Tourism Council at (800) 862-5273, or visit [www.explorecochise.com](http://www.explorecochise.com).

### Cochise Origins Project

In 2008, the Cochise County Tourism Council was awarded a grant from the Arizona Office of Tourism to continue its "Cochise Origins" project, which promotes geotourism. The project highlights five geotourism themes found throughout the county: indigenous peoples, Mexico and Hispanic influences including Spanish expeditions, the region's old west and ranching history, the evolution of military forts in the region, and the role of geology and mining.

### Tourism Marketing and Visitor Services

Tourism marketing and visitor services are functions of Sierra Vista's Communication & Marketing Division and include operation of the city's visitor center and participation in the cooperative efforts of the Cochise County Tourism Council. Staff and volunteers at the Sierra Vista Visitor Center provide information to visitors and residents about activities, attractions, places to stay, and places to eat. The city's Communication & Marketing Division also promotes Sierra Vista as a central location from which to explore Southeastern Arizona.

Capitalizing on Sierra Vista's status as the economic hub of Cochise County, the city has developed marketing strategies that include efforts targeted toward what the Communication & Marketing Division considers high-value visitors, such as geotourists. According to the division, geotourists stay longer and spend more money on travel related expenditures. Another strategy of the Communication & Marketing Division is to change people's perceptions of Sierra Vista as being located in the hottest, driest, most desolate area of the state to it being located in one of the most eco-friendly and beautiful areas of the state. Toward this effort, the city created the slogan "Sierra Vista – It's Cooler than You Think." According to the Communication & Marketing Division, the slogan pertains not only to the weather, but to the community, lifestyle, and environment.

According to the Communication & Marketing Division, the city focuses not only on



the broader target market of geotourism, but also on the two specific niche markets for birding and history. To support this strategy, the city has published two niche brochures: the new “Cool History” brochure and the “Cool Birding and Wildlife” brochure. The city’s promotional materials, which also include an official visitor’s guide, driving tour CDs, the [www.VisitSierraVista.com](http://www.VisitSierraVista.com) website, press releases to encourage travel writers to write about Sierra Vista, and promotional videos are intended to market Sierra Vista as a destination and encourage more people to visit, thereby maximizing the economic benefits of tourism.

## Tourism Trends in Sierra Vista

Tourism in Sierra Vista, as measured by visits to the Sierra Vista Visitor Center, increased substantially from 2005 to 2008, but saw a significant decline in 2009 as the nationwide recession took its toll. Between 2005 and 2008, the annual number of visitors increased by nearly two-thirds. Most of this growth occurred in 2007 and 2008, which saw visits increase by 31 and 19.5 percent, respectively. Cochise College Center for Economic Research focus group discussions in Sierra Vista indicate the increase may have been due in part to recent efforts by the City of Sierra Vista and the Cochise County Tourism Council to market Sierra Vista and all of Cochise County as a year-round tourist destination. This is supported by Sierra Vista Visitor Center visitor counts, which show nearly a 135 percent increase in visitors from July through August 2007 – typically the slowest quarter of the year for tourism to the city. Although visits during the third quarter declined by 14.5 percent in 2008 and 23.7 percent in 2009, the number of third-quarter visits in 2009 was considerably higher than in 2006. In 2009, with the economic recession, visits were down overall by 19.5 percent; however, much of the decline occurred in the first three quarters of the year. In the fourth quarter of 2009, visits were down only 1.3 percent compared to the fourth quarter of 2008, signaling a potential rebound. Although visits were down overall in 2009 when compared to 2008, they remained more than 25 percent higher than in 2006, prior to the city’s tourism boom.

Traditionally, January through March is the busiest season for the Sierra Vista Visitor Center. Between 2005 and 2009, the visitor center received an average of 7,782 visitors in the first quarter of each year. The slowest quarter of the year for visitors has been July through September, which has seen an average visitor count of 4,151. With the exception of the third quarter of the year, visits in each quarter of 2009 were above the most recent 5-year averages despite the economic downturn.



San Pedro River  
Photo: City of Sierra Vista

## Cochise County State and National Park Visitations

Since the recession began in December 2007, visitors to Cochise County have opted for the less expensive ecotourism destinations rather than the traditional destinations of Tombstone and Bisbee. The Coronado National Memorial saw visits increase by 27 percent in 2008 and 14 percent in 2009. Visits to the Chiricahua National Monument were down 3.2 percent in 2008; however, visits were up 7.6 percent in 2009.

Visits to Kartchner Caverns State Park fell by 4.2 percent in 2008 and 6 percent in 2009. Visits declined in 4 of the 5 years from 2005 through 2009. Kartchner Caverns has not benefited from the apparent shift to ecotourism destinations likely due to the park’s relatively higher entrance fees. Visits to the Fort Bowie National Historic Site increased by 0.7 percent in 2008 but were down 4.5 percent in 2009.

The Tombstone Courthouse State Historic Park saw visits increase by 0.1 percent in 2008, but in 2009 the number of visits was down by 14.5 percent. In January 2010, the Arizona State Parks Board voted to close 13 state parks, including the Tombstone Courthouse State Historic Park.

### COCHISE COUNTY STATE PARK VISITATIONS

YEAR	KARTCHNER CAVERNS STATE PARK		TOMBSTONE COURTHOUSE STATE HISTORIC PARK	
	VISITATIONS	CHANGE	VISITATIONS	CHANGE
2005	179,129	-25.8%	59,330	0.6%
2006	157,417	-12.1%	50,936	-14.1%
2007	159,892	1.6%	51,866	1.8%
2008	153,224	-4.2%	51,932	0.1%
2009	144,089	-6.0%	44,403	-14.5%

Source: Arizona State Parks and Cochise College Center for Economic Research.

### COCHISE COUNTY NATIONAL PARK VISITATIONS

YEAR	CHIRICAHUA NATIONAL MONUMENT		CORONADO NATIONAL MEMORIAL		FORT BOWIE NATIONAL HISTORIC SITE	
	VISITATIONS	CHANGE	VISITATIONS	CHANGE	VISITATIONS	CHANGE
2005	60,224	11.2%	86,618	-3.3%	9,656	1.8%
2006*	61,579	2.2%	71,111	-17.9%	10,679	10.6%
2007	58,434	-5.1%	71,702	0.8%	10,027	-6.1%
2008	56,557	-3.2%	91,028	27.0%	10,095	0.7%
2009	60,846	7.6%	103,811	14.0%	9,641	-4.5%

\*Areas of the Coronado National Memorial were closed to the public in August and September 2006 due to damage from flash flooding. Source: Arizona Office of Tourism and Cochise College Center for Economic Research.

Combined with earlier closings due to the state's fiscal crisis and the sweeping of funds from the parks board budget, only 9 of the state's 27 state parks will remain open. In fiscal year 2009, the Tombstone Courthouse operated at a loss of \$53,000, according to figures released by the parks board. This means the cost of operating the courthouse exceeded the amount of direct revenue generated by the park by \$53,000. So closing the park stands to save \$53,000 from the Arizona State Parks budget. However, in considering the impact of closing the courthouse, it is instructive to look beyond entrance fees and costs of operation, and to consider the impact on economic activity, including jobs and tax revenue generated. According to data from a 2009 study conducted by Northern Arizona University, closing the courthouse will result in an annual loss of \$7.5 million in direct, indirect, and induced economic activity in Cochise County, which means the loss of about 100 jobs and approximately \$560,000 in annual state and local government tax revenue (these figures are expressed here in 2009 dollars, adjusted for inflation from the 2007 figures used in the study). Based on analysis by Dean Runyon Associates in its annual report on the impact of tourism and travel in Arizona, conducted for the Arizona Office of Tourism, it can be

estimated that approximately \$290,000 of the lost tax revenue would have gone directly to state coffers, more than offsetting the \$53,000 revenue shortfall. The park is scheduled to close at the end of March 2010 unless an agreement is reached by the state parks board and the city of Tombstone and Tombstone Chamber of Commerce to keep the park open under local management and operation.

### Lodging in Sierra Vista

As of early 2010 there were approximately 1,780 available lodging rooms in the Sierra Vista area. Despite the 3.8 percent real decline in accommodation sales countywide in 2008, Sierra Vista's accommodation sales, and associated tax revenue increased by 9.2 percent in real terms. In the first 11 months of 2009, countywide accommodation receipts were down by 4.7 percent while Sierra Vista's receipts were up by 6 percent (for more on Sierra Vista's accommodation sales, see the Retail Trade and Commerce section of this publication).

### Cochise County Lodging Indicators

Despite the strong performance of the accommodation industry in Sierra Vista, Cochise County's lodging industry struggled in 2008 and 2009, according to AOT lodging indicator data. In 2008, Cochise County's lodging occupancy rate decreased by 11.3 percent, falling from 72.4 to 64.2 percent for the year. Cochise County's lodging occupancy rate of 64.2 percent was slightly above the nationwide rate of 63.1 percent, but was below the statewide rate of 66.2 percent.

The average daily room rate in Cochise County increased by 7.2 percent from \$63.60 to \$68.16 in 2008. Notwithstanding this increase, Cochise County's average daily room rate was about 35 percent below both the state and national rates. Despite the increase in the average daily room rate, revenue generated per available room was down by 5.0 percent from \$46.05 to \$43.75. In Cochise County, revenue generated per available room in 2008 was 37.4 percent below the state level and 31.3 percent below the national level.

Lodging room demand in Cochise County was down by 2.4 percent in 2008. Although demand was down, the decline was not as steep as that seen at the state level. Statewide, room demand was down 5.2 percent in 2008, more than double the level of decline in Cochise County. Nationwide, room demand was down 1.6 percent for the year. Lodging room supply in Cochise County was up



Amerind Museum  
Photo: Amerind Foundation

10.1 percent in 2008, due largely to the opening of several new hotels in Sierra Vista. The increase in room supply in Cochise County was the second highest in the state behind Yuma County, which saw a 16.6 percent increase.

From January through November 2009, Cochise County's occupancy rate was down 12.4 percent compared to the same period the year prior. The average daily room rate was down 2.9 percent and revenue generated per available room was down 14.9 percent. Room supply was up 2.3 percent and demand was down 10.4 percent in the first 11 months of the year.

## Economic Impact of Tourism in Cochise County

According to research commissioned by AOT and conducted by Dean Runyon Associates, total travel-related spending in Cochise County was \$351.3 million in 2008, down 0.1 percent from 2007. Overnight visitors who stayed in lodging establishments (including campgrounds) in Cochise County accounted for 45.8 percent of all spending by visitors. Those who stayed in private homes, including vacation homes, accounted for 20.2 percent of total visitor spending, while day travelers accounted for 33.6 percent. In 2008, 49.3 percent of spending by visitors to Cochise County was for leisure and hospitality services (arts, entertainment, recreation, accommodations, and food service). Spending on retail (including food stores) accounted for 34.7 percent and transportation accounted for 15.9 percent.

Approximately 4,520 jobs were generated in Cochise County in 2008 by travel-related spending, according to the Dean Runyon Associates study. More than 80 percent of those jobs were in leisure and hospitality services. Travel-related spending accounted for approximately \$83.4 million in direct earnings and generated approximately \$11.7 million in direct local government tax revenue. These are taxes levied on visitors rather than residents. This leaves more money in the hands of residents, increasing their purchasing power and, as a result, generating higher levels of local spending that also strengthen local area job growth.

As noted by the Dean Runyon Associates study, the jobs, earnings, and tax revenue generated by travel spending are relatively more important for the rural areas of Arizona, including Cochise County, than for the larger metropolitan areas of the state. AOT has dedicated funding and resources specifically designed to assist rural communities in marketing their tourism-related products and services. AOT has also developed a series of customer service and grant workshops to assist Arizona's rural communities in their tourism-related efforts. For more information, visit the AOT website at [www.azot.gov](http://www.azot.gov).

### COCHISE COUNTY TRAVEL IMPACTS

	2005	2006	2007	2008
<b>TOTAL DIRECT TRAVEL SPENDING (\$MILLION)</b>				
Visitor Spending at Destination	319.5	326.8	350.9	350.3
Other Travel*	0.8	0.8	0.9	1.0
Total Direct Spending	320.3	327.7	351.8	351.3
<b>VISITOR SPENDING BY TYPE OF TRAVELER ACCOMMODATION (\$MILLION)</b>				
Hotel, Motel	78.9	86.2	106.1	110.0
Campground	48.6	50.7	50.9	50.4
Private Home	63.3	65.9	67.2	63.3
Vacation Home	6.5	6.8	7.0	7.4
Day Travel	120.5	115.7	118.0	117.6
Spending at Destination	319.5	326.8	350.9	350.3
<b>VISITOR SPENDING BY COMMODITY PURCHASED (\$MILLION)</b>				
Lodging	37.6	40.4	49.0	50.8
Food & Beverage Services	71.9	74.0	81.1	80.0
Food Stores	62.2	57.8	58.9	59.2
Ground Tran. & Motor Fuel	44.6	50.5	53.7	55.8
Arts, Entertainment & Recreation	40.0	41.3	43.8	42.0
Retail Sales	63.2	62.8	64.3	62.5
Spending at Destination	319.5	326.8	350.9	350.3
<b>INDUSTRY EARNINGS GENERATED BY TRAVEL SPENDING (\$MILLION)</b>				
Accommodation & Food Services	33.6	35.4	41.6	43.8
Arts, Entertainment & Recreation	17.6	19.1	20.2	20.3
Retail**	18.3	18.2	18.6	18.3
Auto Rental & other ground tran.	0.3	0.3	0.3	0.3
Other Travel*	0.6	0.6	0.7	0.7
Total Direct Earnings	70.4	73.5	81.4	83.4
<b>INDUSTRY EMPLOYMENT GENERATED BY TRAVEL SPENDING (JOBS)</b>				
Accommodation & Food Services	2,110	2,140	2,270	2,290
Arts, Entertainment & Recreation	1,220	1,260	1,380	1,440
Retail**	810	800	800	750
Auto Rental & other ground tran.	10	10	10	10
Other Travel*	20	20	20	20
Total Direct Employment	4,160	4,230	4,480	4,520
<b>GOVERNMENT REVENUE GENERATED BY TRAVEL SPENDING (\$MILLION)***</b>				
Local	10.5	10.7	11.8	11.7
State	11.7	12.0	12.8	12.5
Total Direct Gov't. Revenue	22.2	22.7	24.6	24.3

Note: 2008 data are preliminary. Details may not add to totals due to rounding. \*Other Travel includes resident air travel and travel arrangement. \*\*Retail includes gasoline. \*\*\* Property taxes and sales tax payment of travel industry employees not included. Source: Dean Runyon Associates and Arizona Office of Tourism.

## Sierra Vista Calendar of Events, 2010

### JANUARY

**Jan 23 & 24, 2010: Arizona Folklore Preserve – "Wintertime and Snowing"** Enjoy the music of Arizona's Official State Balladeer, Dolan Ellis at the intimate setting of the Folklore Preserve in Ramsey Canyon. 2 p.m. Arizona Folklore Preserve, 44 E. Ramsey Canyon Road, Hereford. Admission \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Jan 30 & 31, 2010: Arizona Folklore Preserve – "Bordergrass"** "Bordergrass" Trio Way Out West. 56 E. Folklore Trail off Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Jan 30 & 31, 2010: Arizona Folklore Preserve – "Keeter Stuart"** Enjoy the music of singer Keeter Stuart at the intimate setting of the Folklore Preserve in beautiful, forested Ramsey Canyon. 2 p.m. Arizona Folklore Preserve, 44 E. Ramsey Canyon Road, Hereford. Admission \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

### FEBRUARY

**Feb 12, 2010: The Arizona Folklore Preserve celebrates Cochise Cowboy Poetry & Music Gathering** 10 a.m. - 2009 WMA Female Poet of the Year Doris Daley. 11:15 a.m. 2009 WMA Male Performer of the Year Bill Barwick. 12:15 p.m. Lunch (lunch available for \$10 - reservations required). 12:45 p.m. 2008 WMA Crescendo Award Winners The Tumbling Tumbleweeds. 2:00 p.m. Prickly Pear and the Cactus Chorale. Arizona Folklore Preserve, 56 E. Folklore Trail, Hereford. \$40 for all shows. Reservations required. Contact: (520) 378-6165, [www.arizonafolklore.com](http://www.arizonafolklore.com) or [reservations@arizonafolklore.com](mailto:reservations@arizonafolklore.com).

**Feb 12-14, 2010: 18th Annual Cochise Cowboy Music & Poetry Gathering** Seventy artists from all over the US and Canada converge on Cochise County for three major stage performances and free mini-concerts on Saturday. Friday and Saturday headline performances at 7 p.m.; Sunday matinee at 1 p.m. 5225 Buena School Blvd. General admission \$18; Seniors (55+), retired/active Military \$16; Students (through high school) \$6. Contact: [www.cowboypoets.com](http://www.cowboypoets.com).

**Feb 20, 2010: Arizona Folklore Preserve – Trails and Rails** Western history told with cowboy and train songs and stories. 56 E. Ramsey Canyon Road. Matinees at 2 p.m. each day. \$15 adults, \$6 students, 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Feb 20, 2010: Guided Tour of Buffalo Soldier Historic Sites, Fort Huachuca** Learn about the accomplishments and history of Fort Huachuca's Buffalo Soldiers from a member of the Southwest Association of Buffalo Soldiers. \$12 per person. 11:30 a.m. to 3 p.m. Reservations required. Note: Fort Huachuca is an active military installation. U.S. citizens may take the tour and must provide valid photo identification for all over the age of 13. Contact: (520) 417-6960 or (800) 288-3861.

### MARCH

**Mar 7, 2010: The Arizona Folklore Preserve Presents Tony Norris** Folksinger and storyteller. 56 E. Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Mar 13-14, 2010: The Arizona Folklore Preserve Presents Joyce Woodson** AWA 2008 Female Performer of the Year. 56 E. Folklore Trail off Ramsey Canyon Road. Matinees at 2 pm each day. \$15 adults, \$6 students. 17 and under. Reservations required. Contact: (520) 378-6165, [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Mar 20, 2010: The Arizona Folklore Preserve Presents Dolan Ellis** Arizona's Official State Balladeer, presenting "A Song of Arizona Spring." 56 E. Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165, [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Mar 26, 2010: 12th Annual Cochise Community Creative Writing Celebration** Co-sponsored by Cochise College, the University South Foundation, Inc., and the City of Sierra Vista Parks and Leisure Services, with support from other community organizations. Participants may register in advance and ask to be added to the brochure mailing list. They may also register at the door, without entering the contest, on March 26 or 27. Contact: 417-4112, 515-5440, or [creativewriting@cochise.edu](mailto:creativewriting@cochise.edu)

**Mar 27, 2010: The Arizona Folklore Preserve Presents Call of the West** Jeanne Cahill and Jerome Campbell. 56 E. Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165, [www.arizonafolklore.com](http://www.arizonafolklore.com).

### APRIL

**Apr 10, 2010: The Arizona Folklore Preserve Presents Jim Jones** Singer/Songwriter Jim Jones, AWA 2008 Male Vocalist of the Year. 56 E. Folklore Trail off Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Apr 17, 2010: The Arizona Folklore Preserve Presents Sid Hausman** Cowboy Singer/Songwriter. 56 E. Folklore Trail off Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

**Apr 24, 2010: 5th Annual West End Block Party** Entertainment, food, music, kiddie land games, Farmer's Market, the Tombstone Vigilantes, and a street dance. Come hang out at Sierra Vista's West End from 11 am to 11 pm. Contact: (520) 458-5333.

**Apr 25, 2010: The Arizona Folklore Preserve Presents Dolan Ellis** Arizona's Official State Balladeer. 56 E. Folklore Trail off Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact : (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

### MAY

**May 1, 2010: The Arizona Folklore Preserve Presents Teodoro "Ted" Ramirez** Arizona Culture Keeper and Tucson's Official Troubadour, Teodoro "Ted" Ramirez. 56 E. Folklore Trail off Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

**May 15, 2010: The Arizona Folklore Preserve Presents Richard Lee Cody and Mary Kaye** Western Duo. 56 E. Folklore Trail off Ramsey Canyon Road. Matinees at 2 pm each day. Tickets \$15 for adults, \$6 students 17 and under. Reservations required. Contact Information: (520) 378-6165 or [www.arizonafolklore.com](http://www.arizonafolklore.com).

### JULY

**July 2-4, 2010: 43rd Annual Fourth of July Festivities** 43rd Annual Fourth of July. Events take place Friday, Saturday, and Sunday in Veterans Memorial Park. Entertainment, food, and fun. The greatest fireworks display in southeastern Arizona! Contact: (520) 417-6960 or (800) 288-3861.

### AUGUST

**Aug 4-8, 2010: 19th Annual Southwest Wings Birding & Nature Festival** Windemere Hotel, 2047 S. Hwy 92, Sierra Vista. Field trips, seminars, vendors, silent auction. Contact: (520) 678-8237, [www.swwings.org](http://www.swwings.org), [info@swwings.org](mailto:info@swwings.org)

### SEPTEMBER

**Sep 10-11, 2010: Oktoberfest** Autumn in Sierra Vista is Arizona at its finest. Enjoy the rich German and ethnic cuisine available from various food vendors. Adults will enjoy the Beer Garden, and there will be plenty of activities for the kids, as well as live entertainment and arts and crafts vendors. Sept. 10, 5-11 pm, Sept. 11, 11 am-11pm. Veterans' Memorial Park. Contact: (520) 458-7922.

### OCTOBER

**Oct 2-3, 2010: 39th Annual Art in the Park** Veterans Memorial Park, 3105 E. Fry Blvd., Sierra Vista. Fine arts and crafts festival with more than 200 vendor booths. Sat. 9 a.m. - 6 p.m. and Sun. 9 a.m. - 4 p.m. Free. Contact: (520) 378-1763, [www.huachuca-art.com](http://www.huachuca-art.com).

**Oct 9, 2010: 23rd Annual Cars in the Park** Veterans Memorial Park, 3105 E. Fry Blvd., Sierra Vista. With 350 vintage and custom cars and trucks, this show pleases everyone. 8a.m. to 3p.m. Free. Contact: (520) 803-9457, [www.sierravistacarclub.org](http://www.sierravistacarclub.org).

**Oct 16, 2010: 11th Annual High Desert Crafters Fall Fair** Windemere Hotel & Conference Center, 2047 S. Hwy 92, Sierra Vista. Have fun browsing and buying gifts for the upcoming holiday season. 8:30 a.m. – 2 p.m. Free. Contact: (520) 803-7267

### DECEMBER

**Dec 4, 2010: 52st Annual Holiday Parade** A family-oriented event that will set the mood for the incoming holidays. Route is from Buffalo Soldier Trail along Fry Boulevard to Coronado Drive. 5:30 p.m. Free. Contact: (520) 458-6940.

**Dec 5, 2010: Holiday Tour of Historic Officers' Homes - Fort Huachuca** A uniformed soldier will greet you at the door of each turn-of-the-century officer's home decorated for the holiday season. 1p.m. – 5p.m. \$10 in advance; \$12 at the door. Fort Huachuca Museum. (Note: Fort Huachuca is an active military installation and specific entrance requirements are enforced. U.S. citizens may enter the post with a visitor pass, received from the guardhouse at the Main Gate. Required documentation includes: vehicle registration and insurance, as well as current and valid photo identification for driver and all passengers over 13.) Contact: (520) 417-6960







## Renewable energy

### Overview

There is a growing sense that reformation of energy production, use, and infrastructure will be a key component of long-term economic growth strategies at the national, state, and local levels. The expansion of renewable energy resources and the advancement of technology to harness and distribute renewable energy will be at the center of this movement. President Obama, soon after taking office in 2009, announced his intention of making energy reformation an integral part of his economic recovery plan. At the state level, there has long been recognition that Arizona is well positioned to be a leader in harnessing and distributing alternative energy, particularly solar energy.

Sulphur Springs Valley Electric Cooperative, Inc. (SSVEC), which provides electrical service to the Sierra Vista area and other areas of the county and state, offers several incentives to promote the use of alternative energy. In addition to the SSVEC incentives, customers may also qualify for federal and state tax credits.

### SSVEC Renewable Energy Program

In December 2007, the SSVEC Renewable Energy Surcharge and Tariff (REST) Program, also known as the SunWatts Program, was approved by the Arizona Corporation Commission (ACC). SunWatts includes several contribution, rebate, loan, and other incentive programs to promote the use of renewable energy. (Note: The information provided in this section regarding SSVEC incentives was current at the time of publication. The Cochise College Center for Economic Research cannot guarantee the reliability, accuracy, or completeness of this information and the information may be subject to change. For detailed and up-to-date information on renewable energy incentives in the SSVEC service area, visit [www.ssvec.org](http://www.ssvec.org).)



### SUN WATTS GREEN CONTRIBUTION PROGRAM

SSVEC members may voluntarily contribute additional money on their monthly electric bills to help fund various renewable energy programs. The money contributed is placed in the SSVEC Renewable Energy Fund.

### RESIDENTIAL AND SMALL COMMERCIAL (UNDER 20 KW) REBATE PROGRAM

This program provides incentives to SSVEC members for the installation of qualifying renewable energy programs (solar, wind, and biomass). SSVEC provides incentives of \$4 per installed watt, or up to 50 percent of the total installed cost of the system, whichever is less. Money available to fund the rebate program is limited, so members must contact SSVEC prior to construction to ensure funds are available.

### LARGE COMMERCIAL (OVER 20 KW) PROGRAMS

Please contact the SSVEC Commercial Representative at (520) 515-3472 for program guidelines.

### NEW HOME BUILDERS PROGRAM

SSVEC offers builders of new homes a \$1,500 incentive for 2kW or larger systems. This rebate is in addition to the residential and commercial rebate program and is payable only to the builder.

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### RESIDENTIAL AND SMALL BUSINESS LOAN PROGRAM

SSVEC members may borrow \$2 per watt up to a maximum of 25 percent of the total cost of the renewable energy project at an interest rate of 3 percent. The loan is secured by a lien on the house or property and is repaid in equal monthly installments over 5 years for loans under \$10,000 and 10 years for loans over \$10,000, with no prepayment penalty. There is a cap on loan amounts of 4 kW for residential systems and 10 kW for small business systems. The loan program has limited funds and is available on a first come, first served basis.

### SOLAR WATER HEATERS

Solar water heaters are eligible for a rebate of \$0.75 per kWh of the first year savings as determined by the Solar Rating and Certification Corporation (SRCC). The SRCC eligible systems can be found at [www.solar-rating.org](http://www.solar-rating.org).

### HABITAT FOR HUMANITY PROGRAM

SSVEC has entered into partnership with Habitat for Humanity to encourage renewable energy options for Habitat for Humanity homes. A maximum of two projects per year are funded.

### RENEWABLE ENERGY TARIFFS

In order to fund the SunWatts Program, SSVEC charges monthly tariffs. The surcharge rate is \$0.005 per kWh per month with the following monthly maximums: residential, \$1.30 per meter per month; commercial and industrial, \$42 per meter per month; and industrial (over 3MWs), \$150 per meter per month.

## **Renewable Energy for Schools Program**

In 2008, solar shade photovoltaic systems were installed at the 41 public school sites in the SSVEC service area in Cochise County at no cost to the schools. The structures are estimated to save each school \$500 per month in electricity costs. The \$11.4 million project was funded under the Federal Energy Policy Act of 2005, which allowed SSVEC to borrow zero-interest bond monies through the Clean Renewable Energy Bond (CREB) program. In addition to generating power, the systems also provide shaded areas for students. The schools are also able to use the system as an educational tool. Students and teachers can access a website that allows them to study how well the systems are working and to see the effects of weather on system performance. The educational component is an effort to make renewable energy more relevant for students and faculty. The program is estimated to generate a combined 975 kilowatts of renewable energy at the sunniest part of the day. Cochise College's Sierra Vista Campus and Benson Center, along with the University of Arizona South in Sierra Vista, are also included in the project. SSVEC owns and maintains the units, and donates the electric power produced by the systems to the schools.

The Center for  
Economic Research  
is located at the  
Sierra Vista Campus  
of Cochise  
College



## About the Center for Economic Research

The Cochise College Center for Economic Research (CER), founded in 1995, is dedicated to analyzing and interpreting economic information and educating residents of Cochise County on the local, state, and national economy. The CER provides economic and demographic information, analysis, and forecasting to help community leaders in the public, private, and nonprofit sectors make informed decisions.

The CER hosts economic outlook luncheons each year in Benson, Bisbee, Douglas, and Sierra Vista. The center also produces four major publications annually as part of its Cochise County Economic Outlook Publication Series: *Benson Economic Outlook*, *Bisbee Economic Outlook*, *Douglas Economic Outlook*, and *Sierra Vista Economic Outlook*.

Throughout the year, the CER responds to a wide range of information requests from business and community leaders throughout Cochise County and across the state and region. The CER director serves on community projects, committees, and task forces providing technical expertise in research methodology and serving as a source of economic and demographic information, analysis, and forecasting.

As an extension of Cochise College's educational mission, the CER prepares weekly press releases that are published in newspapers countywide and provide insight into economic issues affecting Cochise County. The CER's quarterly newsletter, *The Indicator*, provides updates on the local economy and CER activities. The CER also produces the *Cochise County Economic Update*, a biweekly compilation of links to online newspaper articles relevant to the Cochise County economy, which is emailed to everyone on the CER's distribution list. The CER's website ([www.cochise.edu/cer](http://www.cochise.edu/cer)) provides updated economic news, information, analyses, forecasts, and studies.

The CER has economic advisory committees in Benson, Bisbee, Douglas, and Sierra Vista. These committees include representatives from various sectors of the local economy who provide advice, expertise, and input to the content of the economic outlook publications and luncheon presentations. They also serve as focus groups for the study of the qualitative aspects of the local economy and provide specialized expertise related to the industries they represent.

The CER is a member of the Association for University Business and Economic Research (AUBER), one of only two community college organizations in the nation holding membership. In addition, the CER is a state data center affiliate, receiving and disseminating U.S. Census Bureau data to local governments and nongovernmental data users at no charge or on a cost-recovery or reimbursable basis.

As an auxiliary department of Cochise College, the CER is charged with raising its own operating budget, independent of the college's budget, through sponsorships, gifts, donations, contract research, and other sources.

Robert Carreira, Ph.D. has served as director of the CER since 2005. He holds a doctor of philosophy degree in public policy and administration, and master's degrees in public administration, education, and international relations.

## Contact the CER

Center for Economic Research  
Cochise College  
901 North Colombo Avenue  
Sierra Vista, AZ 85635  
Phone: (520) 515-5486  
Fax: (520) 515-5343  
E-mail: cer@cochise.edu

## Center Staff

Robert Carreira, Ph.D. – Director  
Iris Routhieaux – Information Specialist  
Roy Bever – Administrative Assistant, Sr.  
Debra Soto – Data Analyst/Sponsorship Coordinator  
Daniel Chung – Office Assistant

## Sierra Vista Economic Advisory Committee

Rick Coffman – Castle & Cooke  
Kay Daggett – City of Sierra Vista  
V. Tina Gilbertson – City of Sierra Vista  
Frank Gonzalez – Lawley Automotive  
Marie Hansen – City of Sierra Vista  
Angela Moncur – Fort Huachuca Public Affairs  
Frank Moro – First West Properties Corporation  
Tom Reardon – Sierra Vista City Council  
Vicente Santana – Arizona Department of Economic Security  
Mark Schmitt – Cochise College Small Business Development Center  
Robert Shepard – Sierra Vista Economic Development Foundation  
Daniel Subia – Chase  
Susan Tegmeyer – Greater Sierra Vista Area Chamber of Commerce  
Robert Zazueta – Southeast Arizona Association of Realtors

The new  
learning center at  
Cochise College  
Sierra Vista  
campus



## Cochise College resources

### Adult Education

Adult Education offers various programs that are free to all Cochise County residents 16 years of age and older. These programs include English language acquisition (ELA), GED (high school equivalency) preparation, adult basic education, reading, math, writing, computer skills, civics, citizenship, family literacy, and workplace education. Classes meet on Cochise College campuses as well as other locations in the county. For more information please email [adulthoodeducation@cochise.edu](mailto:adulthoodeducation@cochise.edu) or call the Benson Center at (520) 586-1981, the Douglas Campus at (520) 364-3736, Sierra Vista Campus at (520) 515-5456, or the Willcox Center at (520) 384-4502.

### Career Services Center (CSC)

The CSC provides job search skills and placement assistance to students and alumni of the college. Cooperative Education internship programs are available for students seeking to gain experience in their field of study. Students receive academic credit for these field experiences. In addition, the CSC provides students with current listings of off-campus job openings and refers interested candidates to employers. CSC posts available job opportunities at no charge to employers. For more information, please call the Sierra Vista Campus Center at (520) 515-5457 or the Douglas Campus Center at (520) 417-4750.

### Center for Lifelong Learning (CLL)

Nontraditional training and outreach are an important part of the Cochise College mission and the Center for Lifelong Learning (CLL) offering a wide variety of training services to individuals and



organizations locally and internationally. Both credit and noncredit courses are offered in the classroom, off campus, and online. Topics include a wide variety of professional development courses, personal enrichment and local interest classes, and computer workshops. Customized classes on nearly any topic can be contracted to support area businesses and organizations. CLL publishes a quarterly schedule of offerings and a complete listing of courses can be found on the college website.

The region offers a unique combination of historical and natural attractions. The border location makes the college the logical setting for a center dedicated to exploring, disseminating, and protecting cultural and natural resources and contributing to the economic development of the area. CLL continues its mission of establishing the college as a leader in border related studies, training, and research and is a strong partner to existing organizations in resource availability and procurement.

CLL works with its partners to identify and implement entrepreneurial activities related to the rich historical, cultural, and geographic characteristics of Southeast Arizona and the border area and to meet the training and educational needs of the community. For more information, call (520) 515-5492 or email [training@cochise.edu](mailto:training@cochise.edu).

## **Cochise College Foundation**

The Cochise College Foundation promotes student success through scholarships, facilities development, and program support. By supporting Cochise College, the foundation endeavors to increase the college's accessibility to its diverse and changing communities.

The foundation was incorporated in 1967 and is a 501(c)(3) tax-exempt organization. A volunteer board of directors, representing communities across the district, meets regularly to assure stewardship of funds, oversee activities, review donations, approve financial reports, and develop fundraising strategies.

The foundation offers a variety of giving opportunities, while also providing a wide range of scholarship assistance to students and program assistance to Cochise College departments. During the 2008-09 academic year, the foundation awarded more than \$500,000 in scholarships, including \$176,000 in designated scholarships provided by community organizations. Many donors have established endowments, with interest directed toward scholarships and program support at Cochise College.

To make a tax-deductible gift to support the Cochise College, or for more information, contact the Cochise College Foundation at [foundation@cochise.edu](mailto:foundation@cochise.edu) or (520) 417-4100.

## **Libraries**

The Cochise College library system consists of the Charles Di Peso Library on the Douglas Campus and the Andrea Cracchiolo Library on the Sierra Vista Campus. Many services and resources are also available online at <http://padme.cochise.edu/wordpress>. The libraries house 66,000 books and have more than 300 periodical subscriptions. The libraries also provide access to various web-based periodical indexes, most of which provide the full text of articles. Library access is free to Cochise College students and employees. Non-student Cochise County residents pay a one-time fee of \$3 and show proof of residency.

## **Small Business Development Center (SBDC)**

SBDC provides free one-on-one counseling on any small business topic including marketing, financial planning, business planning, computer information systems, human resource management, government procurement, recordkeeping, and more. The SBDC sponsors workshops and seminars on a variety of topics designed specifically for small business owners. The SBDC also makes available a library of business resources, which includes many of the latest small business books, videotapes, audiotapes, newsletters, and magazines. For more information call (520) 515-5478, or email [sbdc@cochise.edu](mailto:sbdc@cochise.edu).

## Tech Prep

Tech Prep, located on Sierra Vista Campus, is a federally funded Carl Perkins vocational grant administered by the Arizona Department of Education, Career and Technical Education Division. Tech Prep works with Cochise County high schools that offer Career and Technical Education programs to build pathways for high school students to enter into Cochise College Career and Technical Education programs and employment pathways.



The Cochise College COMPACT program is one of the benefits of having a Tech Prep office at Cochise College. The COMPACT program is a scholarship for Cochise County high school students to take Cochise College Career and Technical Education courses at a significantly reduced rate for qualifying courses. Qualified students interested in skilled occupations or technical careers have the opportunity to begin their education at Cochise College while still in high school. Funding is provided by Cochise College and the Wolslager Foundation. Students may choose from courses in the areas of agriculture, welding, avionics, business, computer information systems, nursing assisting, culinary arts, and more. For more information, call (800) 966-7943, ext. 5347; email [douglasr@cochise.edu](mailto:douglasr@cochise.edu); or visit [www.cochise.edu/TechPrep](http://www.cochise.edu/TechPrep).

## Cochise College Governing Board

Mrs. Jan Guy, Chair  
Mrs. Jane C. Strain, Secretary  
Mr. David DiPeso  
Dr. John M. Eaton  
Mr. Don Hudgins

## Cochise College Administration

Dr. James D. Rottweiler  
President

Dr. Verlyn Fick  
Vice President for Instruction/Provost

Mr. Kevin Butler  
Vice President for Administration

Mr. Carlos Cartagena  
Vice President for Information Technology

Mr. Robert Howell  
Vice President for Human Resources



Nancy J.  
Brua Animal  
Care Center

## Community resources

### City of Sierra Vista

1011 N. Coronado Drive, Sierra Vista, AZ 85635  
 City Hall Telephone ..... (520) 458-3315  
 City Hall Fax ..... (520) 458-0584  
 Website ..... [www.SierraVistaAZ.gov](http://www.SierraVistaAZ.gov)  
 Visitor Website ..... [www.VisitSierraVista.com](http://www.VisitSierraVista.com)  
 Virtual Water Resource Center [www.SierraVistaWater.com](http://www.SierraVistaWater.com)  
 Public Information Inquires ..... [pio@SierraVistaAZ.gov](mailto:pio@SierraVistaAZ.gov)

Airport ..... (520) 452-7091  
 Airport Operations ..... (520) 458-5775 ext. 232  
 Ambulance Billing ..... (520) 458-3315 ext. 330  
 Bus Services (VISTA Transit) ..... (520) 417-4888  
 City Attorney ..... (520) 458-3315 ext. 311 or ext. 380  
 City Clerk ..... (520) 458-3315 ext. 350 or ext. 306  
 City Manager ..... (520) 458-3315 ext. 302  
 Communications & Marketing .... (520) 458-3315 ext. 339  
 Community Development ..... (520) 417-4413  
 Compost Facility ..... (520) 452-7072  
 The Cove Aquatic Center ..... (520) 417-4800  
 Ethel H. Berger Center ..... (520) 417-6980  
 Finance Department ..... (520) 458-3315  
 Fire Administration ..... (520) 458-3319

Fire Chief & Marshall ..... (520) 417-4400  
 Graffiti Hotline ..... (520) 452-7019  
 Henry F. Hauser Museum ..... (520) 417-6980  
 Human Resources ..... (520) 417-4411  
 Inspections Hotline ..... (520) 452-7017  
 Mayor ..... (520) 458-3315  
 Nancy J. Brua Animal Care Center ..... (520) 458-4151  
 Oscar Yrun Community Center ..... (520) 458-7922  
 Parks & Leisure ..... (520) 458-7922  
 Parks Maintenance ..... (520) 452-7080  
 Police Chief ..... (520) 452-7500  
 Procurement ..... (520) 458-3315 ext. 321  
 Public Information Office ..... (520) 458-3315 ext. 339  
 Public Works Operations & Administration . (520) 458-5775  
 Public Works Transfer Station ..... (520) 452-9805  
 Public Works Transportation Services .... (520) 458-5775  
 Public Works Wastewater/Sewer Service . (520) 458-5775  
 Refuse Special Pickup ..... (520) 458-7530  
 Sewer Emergencies (After Hours) ..... (520) 458-7530  
 Teen and Youth Center ..... (520) 459-4377  
 Visitor Center ..... (520) 417-6960  
 Vista Transit ..... (520) 417-4888

**SIERRA VISTA FIRE DEPARTMENT**

Emergency ..... 911  
 Fire Station #1 (1295 E. Fry Blvd.) ..... (520) 458-3319  
 Fire Station #2 (4127 Avenida Cochise) .... (520) 452-7075  
 Fire Station # 3 (675 Giulio Cesare) ..... (520) 417-4400

**SIERRA VISTA POLICE DEPARTMENT**

911 N. Coronado Drive, Sierra Vista, AZ 85635  
 Emergency ..... 911  
 Non-Emergency ..... (520) 458-3311  
 Fax ..... (520) 458-3563  
 Email ..... SV.PD@SierraVistaAZ.gov  
 Administration & Operations ..... (520) 452-7500  
 Nancy J. Brua Animal Care Center ..... (520) 458-4151  
 Chief of Police ..... (520) 452-7500  
 Non-Injury Traffic Accidents ..... (520) 458-3311  
 Personnel ..... (520) 458-4411  
 TDD ..... (520) 452-7066

**SIERRA VISTA PUBLIC LIBRARY**

2600 E. Tacoma Street, Sierra Vista, AZ 85635  
 Telephone ..... (520) 458-4225  
 Fax ..... (520) 458-5377  
 Email ..... David.Gunckel@SierraVistaAZ.gov  
 Website ..... www.SierraVistaAZ.gov/svlibrary

**SIERRA VISTA VISITOR CENTER**

3020 East Tacoma Street, Sierra Vista, AZ 85635  
 Telephone ..... (520) 417-6960 or (800) 288-3861  
 Fax ..... (520) 417-4890  
 Email ..... info@VisitSierraVista.com  
 Website ..... www.VisitSierraVista.com

**Greater Sierra Vista Area  
Chamber of Commerce**

21 E. Wilcox Drive, Sierra Vista, AZ 85635  
 Telephone ..... (520) 458-6940  
 Fax ..... (520) 452-0878  
 Email ..... info@sierravistachamber.org  
 Website ..... www.sierravistachamber.org

**Sierra Vista Economic  
Development Foundation**

333 W. Wilcox Dr., Ste. 202, Sierra Vista, AZ 85635  
 Telephone ..... (520) 458-6948  
 Fax ..... (520) 458-7453  
 Email ..... admin@svedf.org  
 Website ..... www.svedf.org

**Sierra Vista Industrial  
Development Authority**

C/O First West Properties Corporation, 1700 S. Hwy 92,  
 Sierra Vista, AZ 85636  
 Telephone ..... (520) 458-1666  
 E-Mail ..... admin@fwpc.net

**Sierra Vista Unified School  
District #68**

3555 E. Fry Blvd., Sierra Vista, AZ 85635  
 Telephone ..... (520) 515-2701  
 Fax ..... (520) 515-2744  
 Email ..... brett.agenbroad@svps.k12.az.us  
 Website ..... www.sierravistapublicschools.com/index.cfm

**Cochise County Board of  
Supervisors**

1415 Melody Lane, Bldg. G, Bisbee, AZ 85603  
 Telephone ..... (520) 432-9200  
 Fax ..... (520) 432-5016  
 Email ..... board@cochise.az.gov  
 Website ..... www.cochise.az.gov

**Housing Authority  
of Cochise County**

100 Clawson Avenue, P.O. Box 167, Bisbee, AZ 85603  
 Telephone ..... (520) 432-8880  
 FAX ..... (520) 432-8890  
 TTD ..... (520) 432-8360  
 Website ..... www.cochise.az.gov/cochise\_housing.aspx

**Fry Fire District**

4817 Apache Avenue, Sierra Vista, AZ 85650  
 Telephone ..... (520) 378-3276  
 Station # 1 (206 North 2nd Street) ..... (520) 458-5523  
 Station # 2 (4817 S. Apache Ave.) ..... (520) 378-2222  
 Station # 3 (5019 Thuma Road) ..... (520) 378-2361  
 Ambulance Billing ..... (520) 378-3276  
 Email ..... info@fryfiredistrict.com  
 Website ..... www.fryfiredistrict.com

**Arizona Department of Economic Security**

2981 E. Tacoma, Sierra Vista, AZ 85635  
 Department/Staff Directory ..... (520) 459-3206  
 Child Protective Services ..... (520) 458-4003  
 Adult Protective Services ..... (520) 459-1859  
 Developmental Disabilities ..... (520) 458-7166  
 Employment Services ..... (520) 459-3206  
 Vocational Rehabilitation ..... (520) 459-7063  
 Unemployment Tax Employer Accounts .... (520) 459-2491  
 Arizona Long Term Care System ..... (520) 459-7050

820 E. Fry Blvd., Sierra Vista, AZ 85635

Family Assistance ..... (520) 459-6901  
 Child Care ..... (520) 459-7128  
 Child Protective Services ..... (520) 459-2965  
 Vocational Rehabilitation ..... (520) 459-7196

77 Calle Portal, Ste. C220, Sierra Vista, AZ 85635

Child Protective Services ..... (520) 459-0728

## **U.S. Customs and Border Protection Agency**

### **(HOMELAND SECURITY)**

3867 S. Towner Avenue, Naco, AZ 85620

(Services also provided by Nogales)

Telephone ..... (520) 432-5349  
 Telephone # 2 ..... (520) 432-3111  
 Fax ..... (520) 432-7798  
 Canine Enforcement Program ..... (520) 761-5977  
 Cargo Facility ..... (520) 432-5349  
 CBP Agriculture ..... (520) 375-5823  
 Entry Control ..... (520) 432-5349  
 Export Control ..... (520) 432-5349  
 Import Specialist ..... (520) 397-2020  
 Passenger Processing ..... (520) 432-5349  
 Report Drug Smuggling ..... (800) 232-5378  
 Seizure and Penalties ..... (520) 761-5947  
 SENTRI/FAST Enrollment Center ..... (520) 375-5801  
 Website ..... www.cbp.gov

## **U.S. Department of the Army**

Fort Huachuca

2300 E. Fry Blvd, Sierra Vista, AZ 85635

Telephone (Automated Directory Asst.) ... (520) 538-7111  
 Telephone (After Hours – Emergency) ... (520) 533-2291  
 Website ..... www.huachuca.army.mil

## **U.S. Department of Defense**

Army Recruiting

2200 El Mercado Loop, Sierra Vista, AZ 85635

Telephone ..... (520) 458-2561  
 Website ..... www.army.com

## **U.S. Department of Defense**

Air Force Recruiting

2200 El Mercado Loop, Sierra Vista, AZ 85635

Telephone ..... (520) 458-0444  
 Website ..... www.airforce.com

## **U.S. Department of Defense**

Navy Recruiting

2200 El Mercado Loop, Sierra Vista, AZ 85635

Telephone ..... (520) 458-6460  
 Website ..... www.navy.com

## **U.S. Department of Homeland Security**

Secret Service

300 West Congress St., Box FB-56, Tucson, AZ 85701

Telephone ..... (520) 670-4730  
 Website ..... www.dhs.gov

## **U.S. Drug Enforcement Administration**

Sierra Vista, AZ 85635

Telephone ..... (520) 458-3691  
 Website ..... www.justice.gov/dea

## **U.S. Federal Bureau of Investigation**

500 E. Fry Blvd., Sierra Vista, AZ 85635

Telephone ..... (520) 459-2232  
 Website ..... www.fbi.gov

## **U.S. Forest Service**

5990 S. Highway 92,, Sierra Vista, AZ

Telephone ..... (520) 378-0311  
 Website ..... www.fs.fed.us/r3/coronado

## **U.S. National Park Service**

Coronado National Memorial

4101 E. Montezuma Canyon Road, Hereford, AZ 85615

Telephone ..... (520) 366-5515  
 Fax ..... (520) 366-5705  
 Website ..... www.nps.gov/coro

## **U.S. Post Office**

2300 E. Fry Blvd., Sierra Vista, AZ 85635

Telephone ..... (520) 458-2540  
 Website ..... www.usps.com

## **U.S. Representative Gabrielle Giffords**

77 Calle Portal, Sierra Vista, AZ 85635

Telephone ..... (520) 459-3115  
 Website ..... www.giffords.house.gov



## Financial Institutions

### AMERICAN SOUTHWEST CREDIT UNION

3090 E. Fry Blvd., Sierra Vista, AZ 85635

Telephone ..... (520) 459-1860

Email ..... talktous@americansouthwestcu.org

Website ..... www.americansouthwestcu.org

### ARMED FORCES BANK (Ft. Huachuca)

Building 52035, Arizona St.

PO Box 12778, Fort Huachuca, AZ 85670

Telephone ..... (520) 452-8630

Website ..... www.afbank.com

### BANK OF AMERICA

3148 E. Fry Blvd., Sierra Vista, AZ 85635

Telephone ..... (520) 458-1441

Website ..... www.bankofamerica.com

### COMPASS BANK

211 S. Carmichael Ave., Sierra Vista, AZ 85635

Telephone ..... (520) 458-1088

Website ..... www.compassbank.com

### CHASE

3932 E. Fry Blvd., Sierra Vista, AZ 85635

Telephone ..... (520) 459-1235

Website ..... www.chase.com

### NATIONAL BANK OF ARIZONA

1160 E. Fry Blvd., Sierra Vista, AZ 85635

Telephone ..... (520) 439-5469

Website ..... www.nbarizona.com

### WELLS FARGO BANK NA

50 E. Fry Blvd., Sierra Vista, AZ 85635

Telephone ..... (520) 459-8489

Website ..... www.wellsfargo.com

## Utilities

### ARIZONA WATER COMPANY

77 Calle Portal, Ste. B-120, Sierra Vista, AZ 85635

Telephone ..... (520) 458-5660

Fax ..... (520) 459-2533

Email ..... SierraVista@AZwater.com

Website ..... www.azwater.com

### COX COMMUNICATIONS

150 E. Wilcox Dr., Sierra Vista, AZ 85635

Telephone ..... (520) 458-4705

Website ..... www.cox.com/arizona

### LIBERTY WATER

4055 E. Campus Dr., Sierra Vista, AZ 85635

Telephone ..... (866) 681-4506

Telephone (After Hours) ..... (866) 780-5734

Fax ..... (520) 459-6680

Email ..... customerservicesierravista@libertywater.com

Website ..... www.libertywater.com

### PUEBLO DEL SOL WATER COMPANY

4226 Avenida Cochise, Ste. 13, Sierra Vista, AZ 85635

Telephone ..... (520) 458-3742

### QWEST

Telephone ..... (800) 244-1111

Website ..... www.qwest.com

### SOUTHWEST GAS

202 E. Wilcox Dr., Sierra Vista, AZ 85635

Telephone ..... (520) 459-1702

Website ..... www.swgas.com

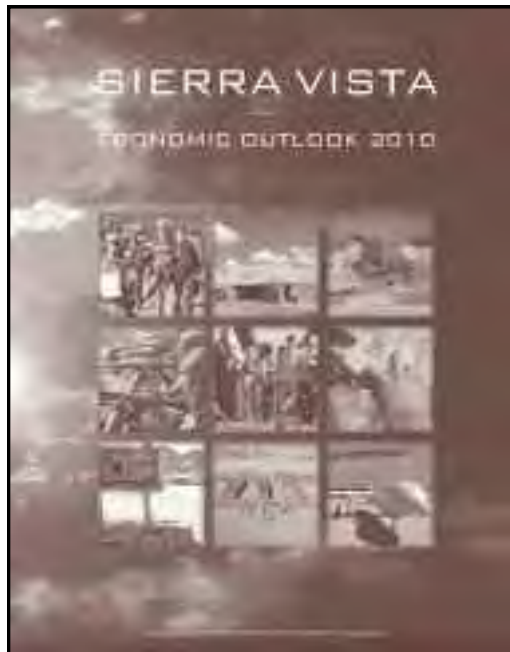
### SULPHUR SPRINGS VALLEY ELECTRIC COOPERATIVE

311 E. Wilcox Dr., Sierra Vista, AZ 85635

Telephone ..... (520) 458-4691

After Hours & Emergencies ..... (800) 422-3275

Website ..... www.ssvvec.org



### **Contact the Center for Economic Research**

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